

NUTANIXTM

XPAND Activation Guide

Tips and steps to kick start demand generation in XPAND



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> What is XPAND?

XPAND is our demand center designed for Nutanix partners. It is a launch pad to drive your Nutanix digital marketing strategy, augment your brand, and increase sales pipeline.

Features include:

- Customizable campaigns
- Social syndication
- Banners and microsites
- Downloadable content
- Analytics and reporting



> How do I log into XPAND?

Navigate to <https://my.zift123.com/#/login>

If you need to register for an account, email
xpand@nutanix.com

> Quick tips before you get started:

1. Have your logo, color scheme and company contact information ready.
 - You'll need these to personalize XPAND assets.
 - Your logo will appear on most design features.
 - Once you customize your first asset, XPAND will remember these settings!
2. Verify who is your XPAND administrator.
 - The admin can only access certain features. Email xpand@nutanix.com to find out who is your admin.
3. [Upload a contact list](#) first: this will streamline email marketing activation.
 - Don't worry – your data is safe. Nutanix will never share or modify your contact lists.
4. [Connect your CRM](#).
 - Pull in lists, simplify lead reporting, automate lead sharing back into your CRM.
 - This is a faster and easier alternative to uploading individual contact lists.
5. Check [XTRIBE](#) for marketer challenges on XPAND.
 - We want to reward you for XPANDING!
6. If you need help, reach out to xpand@nutanix.com
 - Alternatively, research the self-support [portal](#).

NUTANIX™

Activating various capabilities





Update Company Profile Settings

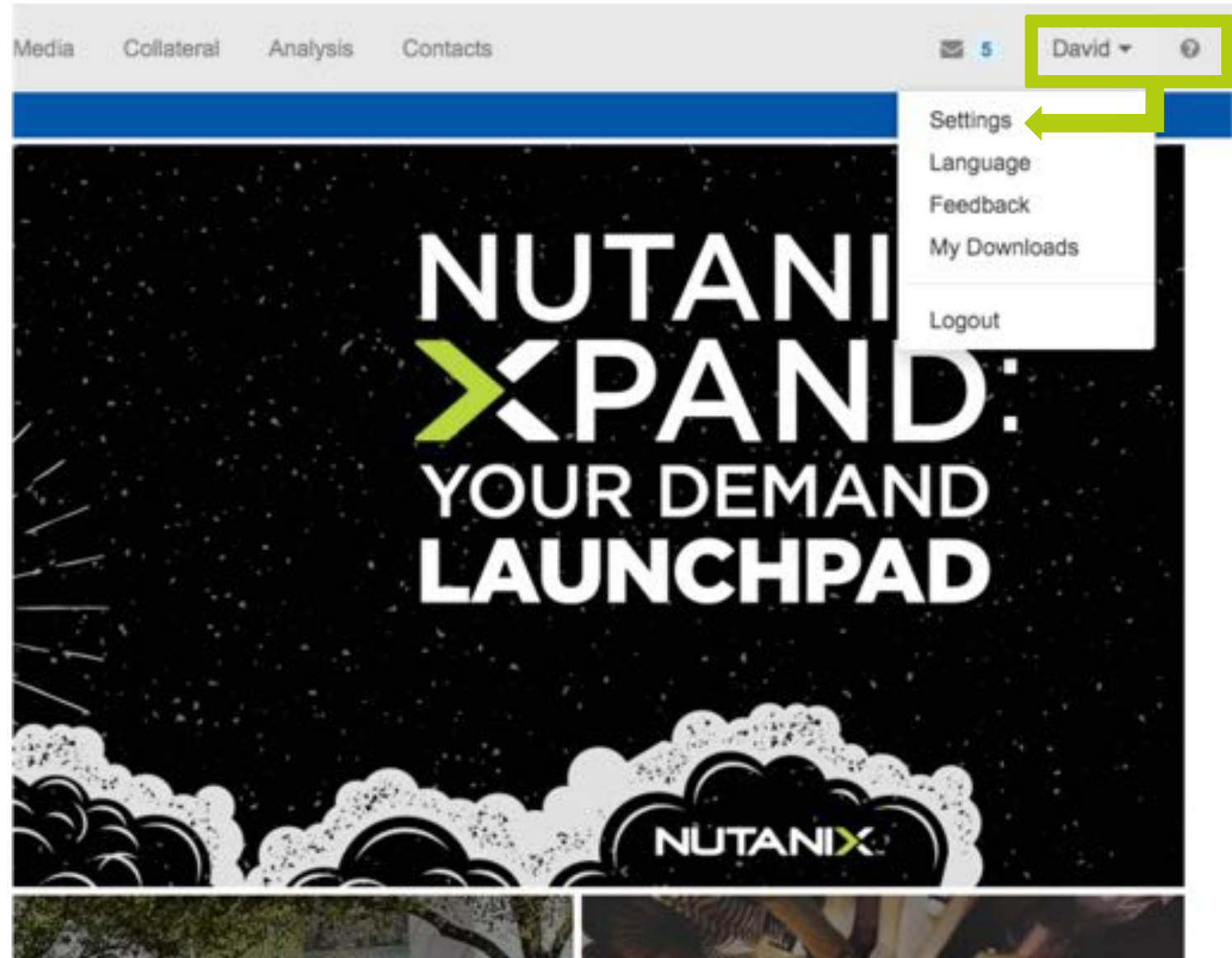
> Your company profile in XPAND

Updating your company profile allows you to:

- Streamline customization of assets in the future including your address and contact information
- Designate your preferred language preference (for communication purposes)
- Set email authorization and suppression list preferences

> How to update your company profile (#1)

1. Click the drop down next to your name.
2. Navigate to 'Settings'.



> How to update your company profile (#2)

3. Navigate to 'Company Profile'.

4. Update the information outlined in green.

Tip:

- 'Opt-In Authorization': Sends an email asking partner to opt-in to your XPAND emails. Good for newly added cold lists.
- 'Unsubscribe Options': Adds all unsubscribed contacts to your global suppression list (**recommended**). If the contact is mistakenly uploaded again, XPAND knows to suppress it.

The screenshot shows the Nutanix XPAND interface. The top navigation bar includes 'Campaigns', 'Web Plugins', 'Social Media', 'Collateral', 'Analysis', and 'Contacts'. The user is logged in as 'David'. The left sidebar contains various settings categories, with 'Company Profile' highlighted in green. The main content area is titled 'Company Profile' and 'Edit Company Details'. The form fields are as follows:

Company Name	Nutanix Demo Account	Address 1	Austin
Time Zone	US/Central	Address 2	Enter address 2
Phone	Enter phone	City	Austin
Fax	Enter fax	Country	United States
		State/Province	Texas
		Zip/Postal Code	78746

Below the form, there are two checkboxes:

- Opt-in Authorization** (checked): Opt-in Authorization is required for a contact to be sent an email.
- Unsubscribe Options** (checked): Add Any Unsubscribes to Global Suppression List.

A 'Save' button is located at the bottom right of the form. At the bottom of the page, there is a 'Language' dropdown menu with options: English, Spanish, German, and French. Another 'Save' button is located at the bottom right of the language section.



Uploading a Contact List

> Contact lists in XPAND

Uploading a list to XPAND is required before sending any email workflow. Here are some things to note:

- All lists require columns for first name, last name, email, and company name per contact. You can also add addresses, phone numbers, titles and other information.
- If submitting a bulk upload, acceptable file formats include XLS, XLSX, TXT, or CSV.
- Nutanix will not share or modify any customer information that belongs to you.

> Uploading a contact list (#1)

The screenshot displays the Nutanix Xpand user interface. The top navigation bar includes 'Campaigns', 'Web Plugins', 'Social Media', 'Collateral', 'Analysis', and 'Contacts'. The 'Contacts' menu is highlighted with a yellow box. Below it, the 'Contact Lists' sub-menu is also highlighted with a yellow box. The main content area shows a 'Create Contact List' button, a search bar, and a list of contact lists. A 'Test' contact list with 0 members is visible. A large green arrow points from the 'Create Contact List' button to a modal form titled 'Create Contact List'. The modal form contains the following fields:

- Contact List Name:** Marketing List
- Sender Name:** Mike Smith
- Sender Email:** Mike.Smith@nutanix.com
- Language:** English

At the bottom of the modal, there are 'Close' and 'Save' buttons.

1. Navigate to 'Contacts', then 'Contact Lists'.
2. Click 'Create Contact list'.
3. Name the list and include the sender information.
4. Click 'Save'.

> Uploading a contact list (#2)

The screenshot shows the Nutanix Xpand interface. The top navigation bar includes 'Campaigns', 'Web Plugins', 'Social Media', 'Collateral', 'Analysis', and 'Contacts'. The 'Contacts' dropdown menu is open, showing options: 'Add Contacts', 'File Import', 'Add Existing Contacts', and 'Add Contact'. The 'File Import' option is highlighted with a yellow box. A yellow arrow points from this box to the 'Browse' button in the 'Upload Contacts' dialog box. The dialog box shows the file selection process, with 'Test List.xlsx' highlighted in a yellow box in the file explorer. A yellow arrow points from this box to the 'Upload' button in the 'Upload Contacts' dialog box.

4. Click 'File Import' from the 'Add Contacts' dropdown.
5. Click 'Browse'.
6. Search for your list.
7. Designate if the first row has header names and confirm opt-in authorizations.
8. Click 'Upload'.

The screenshot shows the 'Upload Contacts' dialog box. The 'Marketing List' is selected. The 'Selected file to import' field shows 'Test List.xlsx'. The 'Browse' button is highlighted. The 'Opt-in Confirmation' section is visible, with the first option selected: 'All contacts in the list are opted in to receive communications from this list'. The 'Upload' button is highlighted.

> Uploading a contact list (#3)

The screenshot shows the Nutanix XPAND interface for uploading contacts. The main heading is "Upload Contacts into list: Marketing List". Below this, there is a table with columns and values. A dropdown menu is open, showing a list of fields to map to. The "First Name" field is selected. The "Upload Contacts" button is highlighted with a yellow arrow.

#	Column	Belongs To Field
1	First Name John	First Name or Create New
2	Last Name Smith	Last Name or Create New
3	Company Nutanix	Company or Create New
4	Email john.smith@nutanix.com	Email Address or Create New

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9. Associate the column in your spreadsheet with XPAND's contact naming conventions. Create a custom field by selecting 'Create New'.

10. When done, click 'Upload Contacts'.

You can now use this list for your XPAND marketing purposes!



Connecting Your CRM

> Connecting your CRM in XPAND

Streamline your marketing and sales efforts by integrating your own CRM with XPAND.

- With this integration, your XPAND contacts and sales data will seamlessly flow from XPAND to your CRM, making it easy to track pipeline.
- You can also pull contact lists from your CRM into XPAND, making marketing execution a breeze.
- Supported CRMs include Salesforce, Microsoft Dynamics, SageCRM, Zoho, Sugar and SalesLink.

> Syncing your CRM (#1)

1. Have your XPAND administrator log into XPAND. If you're unsure who your administrator is, reach out to support: xpand@nutanix.com.
2. Find the dropdown next to your name in the top right corner.
3. Click 'Settings'.
4. Scroll down to 'CRM Settings'.
5. In the top right corner, click 'Add new CRM integration'.

The image shows two screenshots of the Nutanix XPAND interface. The top screenshot shows the user profile dropdown menu in the top right corner, with a yellow box highlighting the 'Settings' option. The bottom screenshot shows the 'CRM Settings' page, with a yellow arrow pointing to the 'Add new CRM Integration' button in the top right corner. A second yellow arrow points from the 'Add new CRM Integration' button to a dropdown menu showing a list of CRM options: Microsoft Dynamics CRM (2011, 2013, or 2016), SageCRM (6.0 or higher), Sugar CRM (6.0.1 or higher), SalesLink (3.5 or higher), and Nightly Lead Export Email (CSV format). A third yellow arrow points from the 'CRM Settings' menu item in the left sidebar to the 'CRM Settings' page title.

> Syncing your CRM (#2)

6. A new screen will open and ask you to enter various details including your CRM credentials and connection settings.

The 'Usage Profile' determines how your data flows between XPAND and your CRM. Hover over the 'i' icon for more information. We recommend checking both boxes.

In the 'Advanced General Options' dropdown, specify how contacts are shared based on lead types, lead mapping fields and campaign information.

7. When done, click 'Save'. Your CRM is now integrated!

The screenshot displays the Nutanix XPAND CRM Settings interface. The left sidebar contains a navigation menu with items like 'Manage Users', 'Company Profile', 'Email Footer', 'Mailing Credits', 'SMS Credits', 'Contact Fields', 'Manage Templates', 'Social Media', 'Install Analytics', 'Notifications', 'Tracking Options', 'Scheduled Reports', 'Suppression List', 'Lead Management', 'CRM Settings' (highlighted), 'Sales Reps', 'Subscriptions', and 'App Connectors'. The main content area is titled 'CRM Settings' and is divided into sections: 'Salesforce', 'General Settings', 'CRM Connection Settings', 'Usage Profile', and 'Advanced General Options'. The 'General Settings' section includes a 'Type' dropdown set to 'Salesforce', a 'Supplier' dropdown set to 'Nutanix XPAND', and a 'Record Leads in CRM as' dropdown set to 'LEAD'. The 'CRM Connection Settings' section has input fields for 'Username', 'Password', and 'Security Key', along with a 'Save and Test CRM Connection' button. The 'Usage Profile' section has checkboxes for 'Marketing Automation' and 'Lead Distribution'. The 'Advanced General Options' dropdown is expanded, showing 'Leads' and 'Campaigns' sections. The 'Leads' section has a 'Lead Event Types' dropdown set to 'Select all | Select none' and a list of checked events: 'Email Open', 'Email Unsubscribe', 'Web Plugin Click', 'Telequalification Event', 'SMS Click', 'Supplier Event', 'Email Click', 'Web Plugin View', 'Form Submission', 'SMS Delivered', and 'Link Conversion'. The 'Campaigns' section has a 'Create Campaigns in CRM' checkbox and a 'Campaign Send Data Level' dropdown set to 'Do not allow field updates'. A 'Cancel' button and a 'Save' button are at the bottom right.



Contact Segmentation with Membership Rules

> Segmenting contacts with Membership Rules

Membership Rules organize inbound traffic and segment contacts for outbound campaigns. Filter through XPAND's CRM with rule logic and automatically add contacts to different groups based on your criteria. These groups are called *Dynamic Membership Lists*.

- Segment existing contact lists and target them with new outbound marketing campaigns.
- Or, capture new inbound contacts and automatically segment contacts into lists.

> Segment existing contacts for new campaigns (#1)

1. Navigate to 'Contacts' and then 'Contact Lists'.

2. To segment existing contacts, click on an existing list. This will take you to the list snapshot.

3. Select 'Membership Rules', then 'Create Membership Rules'.

4. Matching fields will then appear.

The image consists of three overlapping screenshots of the Nutanix Xpand web interface, illustrating the steps to create membership rules for a contact list. The top screenshot shows the 'Contact Lists' page with a 'Marketing List' highlighted. The middle screenshot shows the 'Marketing List' snapshot with the 'Membership Rules' tab selected. The bottom screenshot shows the 'Create Membership Rule' dialog box.

The screenshots show the following steps:

- Navigate to 'Contacts' and then 'Contact Lists'.
- Click on an existing list (Marketing List) to view the list snapshot.
- Select 'Membership Rules' and click 'Create Membership Rule'.

> Segment existing contacts for new campaigns (#2)

5. Using the dropdowns, select the criteria that best relates to your target market. For example, if you wish to target contacts in a certain city, select 'Contact Fields' + 'City' is 'San Jose'. This will then filter all contacts who fit those parameters.

6. Then select 'Set Membership Rule'.

7. Next time you go to execute an email, this Membership Rule will be available in the email wizard. In addition, any new contacts that meet these criteria will automatically be added to the list.

The screenshot displays the NUTANIX XPAND interface for configuring a 'Dynamic Membership Rule' for a 'Marketing List'. The interface includes a navigation bar with 'Contacts' selected, and a sidebar with 'Marketing List' selected. The main content area shows the 'Dynamic Membership Rule' configuration. A rule is defined with the criteria: 'Contact Fields' is 'In Contact List' is 'City' is 'San Jose'. The 'Set Membership Rule' button is highlighted with a yellow box. Below the main interface, two dropdown menus are shown: one for 'Contact Fields' with 'City' selected, and another for 'City' with 'San Jose' selected. A yellow arrow points from the 'Set Membership Rule' button to the 'Contact Fields' dropdown, and another yellow arrow points from the 'City' dropdown to the 'City' field in the rule definition. A third yellow arrow points from the 'San Jose' text input to the 'City' field in the rule definition.

> Segment new inbound leads (#1)

1. To automatically set Membership Rules for inbound leads, click 'Contacts', 'Contact Lists' and then 'Create Contact List'.

2. Name your list and choose a sender name and email. Then, click 'Save'.

3. This will take you to the snapshot. Select 'Membership Rules'.

4. Then, select 'Create Membership Rule'.

The screenshots illustrate the following steps:

- Clicking the 'Create Contact List' button in the 'Contact Lists' section.
- Filling out the 'Create Contact List' form with the name 'Inbound Membership Rule', sender name 'John Smith', sender email 'john.smith@nutanix.com', and language 'English'. The 'Save' button is highlighted.
- Viewing the 'Inbound Membership Rule' list details and selecting the 'Membership Rules' tab.
- Clicking the 'Create Membership Rule' button to define rules for adding contacts to the list.

> Segment new inbound leads (#1)

5. Using the dropdowns, select the criteria that best relates to your target market.

For example, if you wish to target contacts who complete a form field via a microsite, select 'Action' + 'Form Submission' is [the name of the Microsite] collecting the leads.

6. When done, click 'Set Membership Rule.'

Inbound contacts will now be added to Dynamic Membership Lists as they interact with your marketing. Use this list for new nurture campaigns.

The screenshot displays the 'Inbound Membership Rule' configuration page in the Nutanix Xpand interface. The page is titled 'Dynamic Membership Rule' and includes a list of criteria to include contacts. Two dropdown menus are open, showing 'Actions' and 'Form Submission' selected. A 'Set Membership Rule' button is highlighted in the bottom right corner.

Include contacts who match all of these rules...

Actions Form Submission is

Freedom to Build Web Banner
Nutanix Beam - One-Click Cloud Savings
Nutanix InstantOn for Citrix Cloud
TEST - Gartner Magic Quadrant 2018
Web Plugins

Matching Contacts: 0

Set Membership Rule



Activating an Email Workflow

> Email Workflows in XPAND

Email is a vital element to your demand generation strategy. Leverage XPAND's email workflows to nurture your prospects and customers.

- All emails are customizable including content, call-to-action, pictures, logo, color scheme & contact information.
- Add in a unique value proposition to differentiate your brand.
- Leverage [Membership Rules](#) to create automated nurture streams.
- Before you begin, make sure your [contact list](#) is uploaded to XPAND.

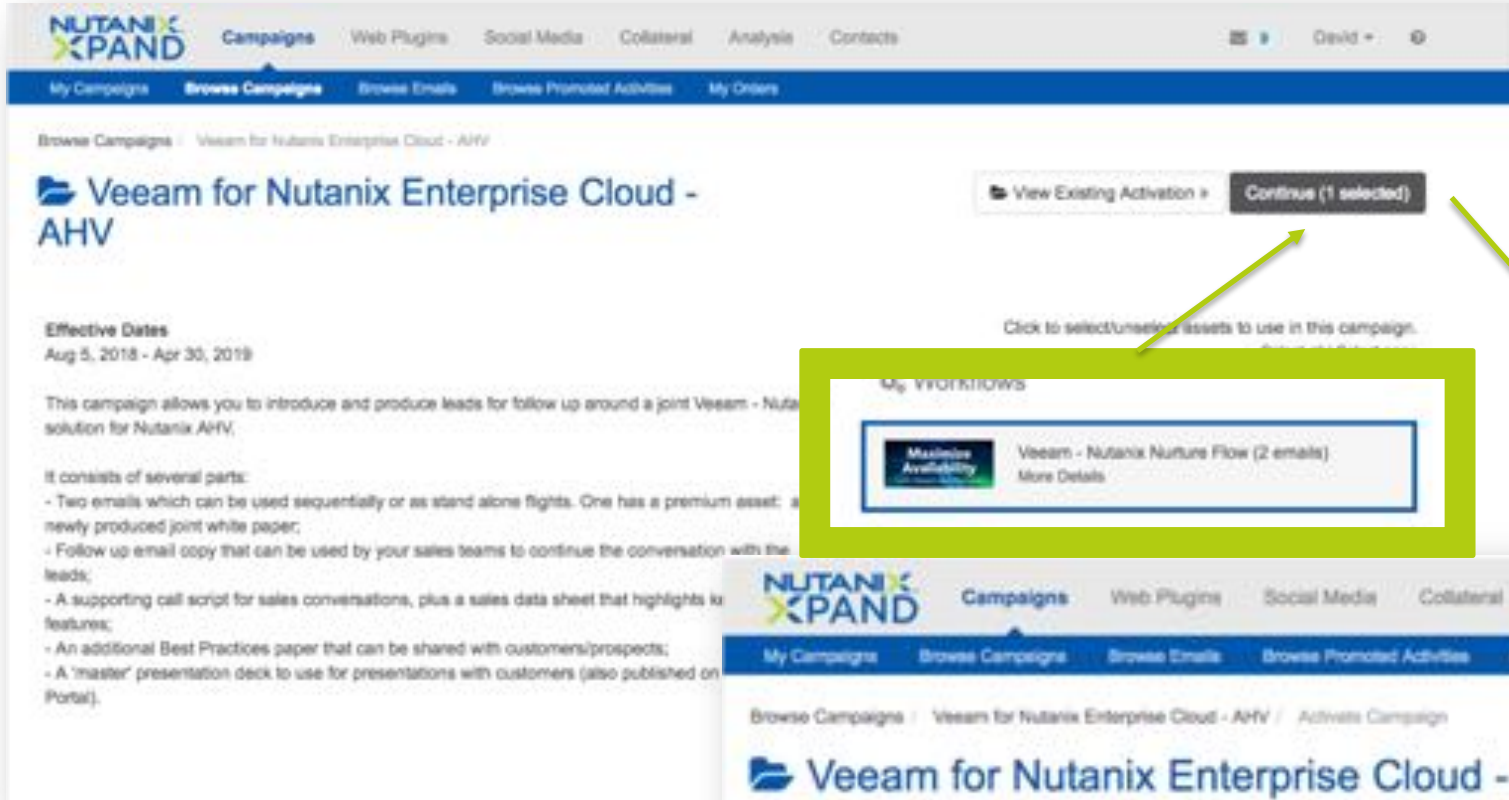
> Activating an email workflow (#1)

The screenshot shows the Nutanix XPAND Campaigns interface. The top navigation bar includes 'Campaigns', 'Web Plugins', 'Social Media', 'Collateral', 'Analysis', and 'Contacts'. Below this, there are tabs for 'My Campaigns', 'Browse Campaigns', 'Browse Emails', 'Browse Promoted Activities', and 'My Orders'. The 'Browse Campaigns' tab is selected and highlighted with a yellow box. A yellow arrow points from this box to the 'Details' button of the first campaign listed, 'Veeam for Nutanix Enterprise Cloud - AHV'. The main content area displays a search for campaigns, with results sorted by 'Most Recent'. The first result is 'Veeam for Nutanix Enterprise Cloud - AHV', which includes a description, a 'Maximize Availability' badge, and a 'Details' button. The second result is 'Nutanix Freedom to Build Campaign - Velocity', and the third is 'Nutanix InstantOn for Citrix'. A left sidebar contains filters for 'Activity Type', 'Language', 'Solutions', 'Products', 'Resource Type', and 'Objective'.

1. Navigate to 'Campaigns'.
2. Select 'Browse Campaigns'.
3. Search for a campaign.
4. Click 'Details' to open the campaign page.

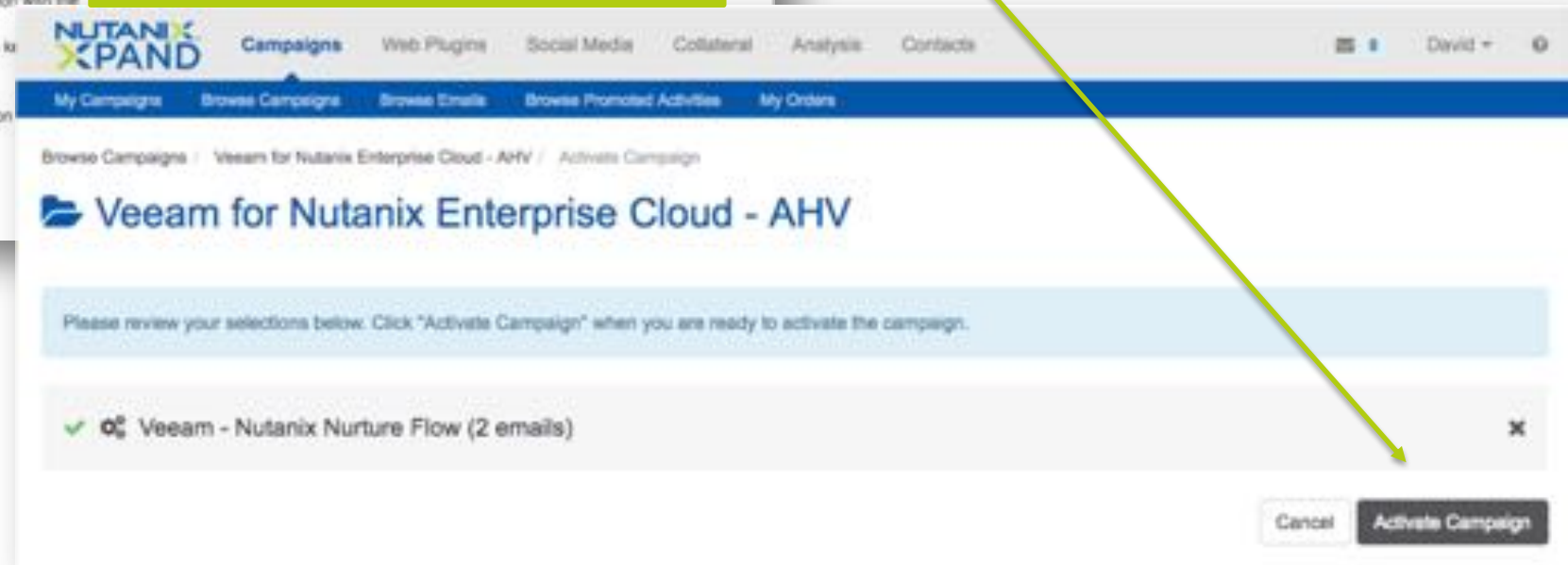
Alternatively, you can activate an individual email by searching 'Browse Emails'.

> Activating an email workflow (#2)

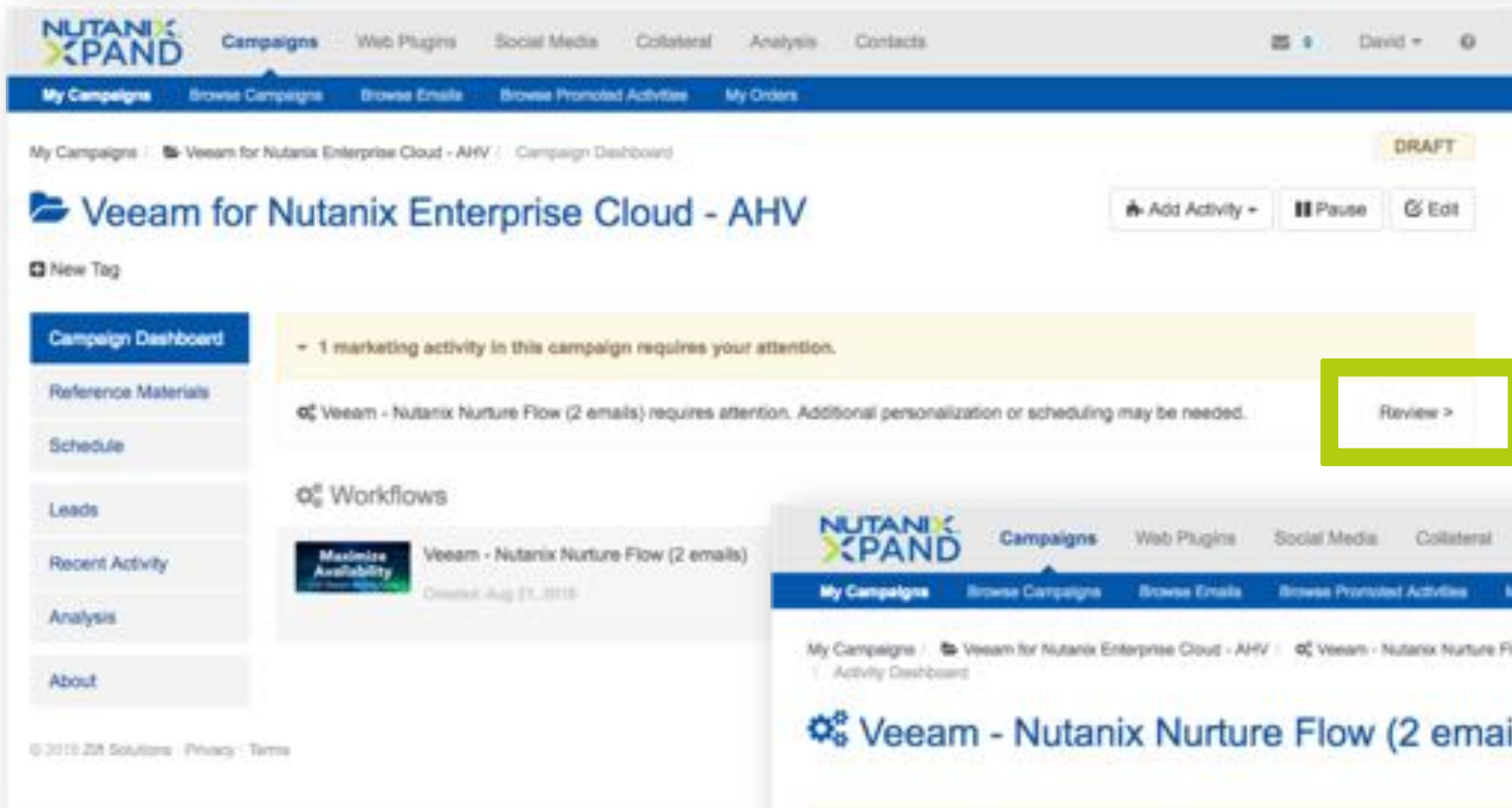


5. Select the email workflow and click 'Continue'.

6. Click 'Activate Campaign'.

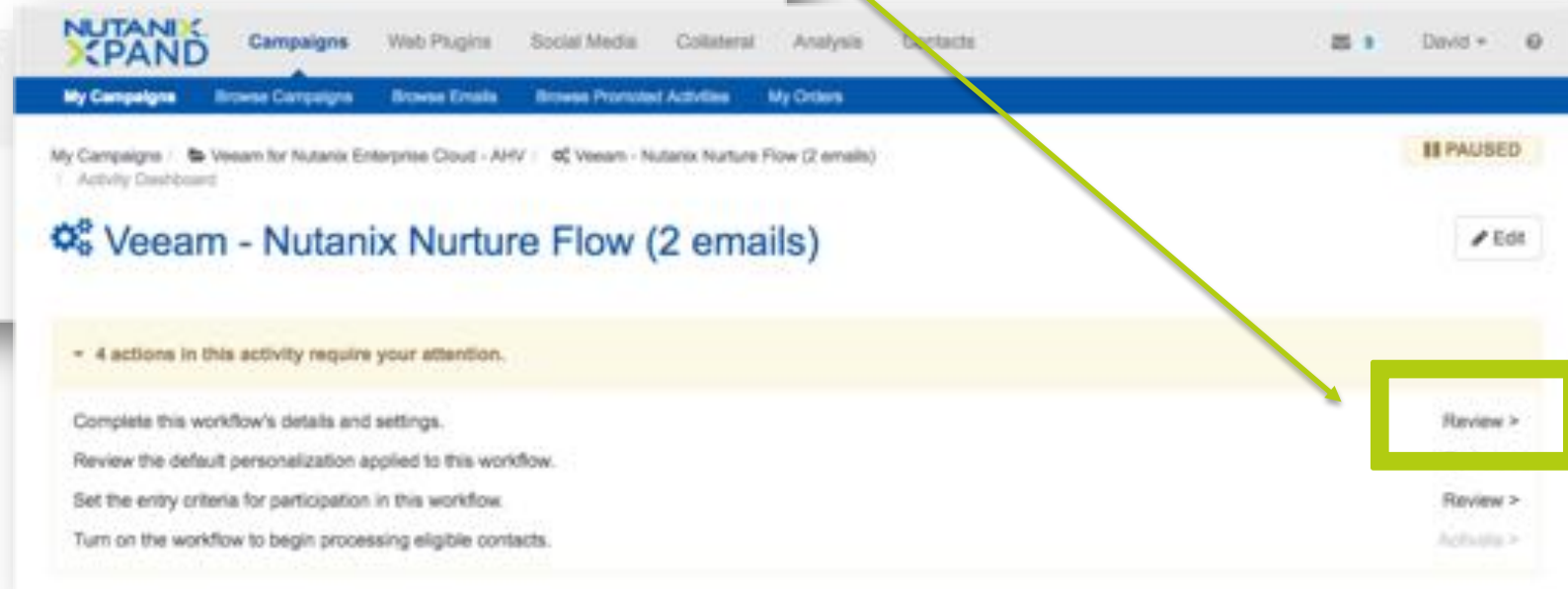


> Activating an email workflow (#3)



7. You'll arrive at the Campaign Dashboard. Click 'Review' to start personalizing.

8. Click 'Review' in the Activity Dashboard to customize each element of the email workflow.



> Activating an email workflow (#4)

The screenshot shows the Nutanix Campaigns interface. At the top, there are navigation tabs: Campaigns, Web Plugins, Social Media, Collateral, Analysis, and Contacts. Below that, there are sub-tabs: My Campaigns, Browse Campaigns, Browse Emails, Browse Promoted Activities, and My Orders. The main content area is titled 'Veeam - Nutanix Nurture Flow (2 emails)'. A yellow box highlights the 'Settings' tab, which is selected. Below the tabs, there is a message: 'Review the default details and notifications set for this workflow. Click 'Save & Next' to confirm and proceed.' The 'Details' section contains the following fields: 'Workflow Name' (Veeam - Nutanix Nurture Flow), 'Sender Name' (Mike Smith), 'Sender Email @' (mike.smith@nutanix.com), and 'Reply to Email' (empty). The 'Notifications' section contains an 'Email' field, a list of recipients (mike.smith@nutanix.com), a frequency dropdown set to 'Weekly', and an 'Add' button. A yellow arrow points from the 'Settings' tab to the 'Details' section, and another yellow arrow points from the 'Add' button to the 'Notifications' section.

9. Define the workflow settings, including who the email is sent from.

This name will appear in the 'From' field in the contact's inbox. You may use a sales representative's, marketer's or company name.

10. Assign who should receive lead notifications. To add a new recipient, type the email address and click 'Add'.

11. Click 'Save & Next'.

> Activating an email workflow (#5)

The screenshot shows the 'Veeam - Nutanix Nurture Flow' workflow configuration page. The 'Workflow Steps' tab is highlighted in yellow. The workflow consists of three main steps: a 'Send Email - Send Mail' step, a 'Wait 7 Days' step, and another 'Send Email - Send Mail' step. Each step has an 'Edit' button highlighted in yellow. The 'Final Step' button is also visible at the bottom.

The 'Wait 7 Days' configuration dialog shows the 'Wait Type' set to 'Wait a specified amount of time', the 'Wait' value set to 7, and the unit set to 'Days'. A dropdown menu is open showing options: Minutes, Hours, Days, Weeks, Months.

The 'Wait for a specific day of week' configuration dialog shows the 'Wait Type' set to 'Wait for a specific day of week', the 'Day of Week' set to 'Monday', and a time selection dropdown is open showing options: 9:03 AM, 10:08 AM, 11:13 AM, 12:18 PM.

12. Establish the timing for each email under 'Workflow Steps' using the 'Edit' buttons.

Note: Workflows are designed to be always-on, so set your execution date by time intervals or day of the week, not a specific calendar date.

13. Click 'Save & Next'.

> Activating an email workflow (#6)

Switch between emails here

14.

14. Make any content customizations in 'Personalization'.

Anything outlined in a dotted line can be customized.

15. Change color schemes & images, add contact information, link social media accounts, leverage your own downloadable asset, and upload your logo in the 'Properties' toolbar.

Note: XPAND will save design preferences, streamlining future customizations.

16. Click 'Save & Next'.

15.

> Activating an email workflow (#7)

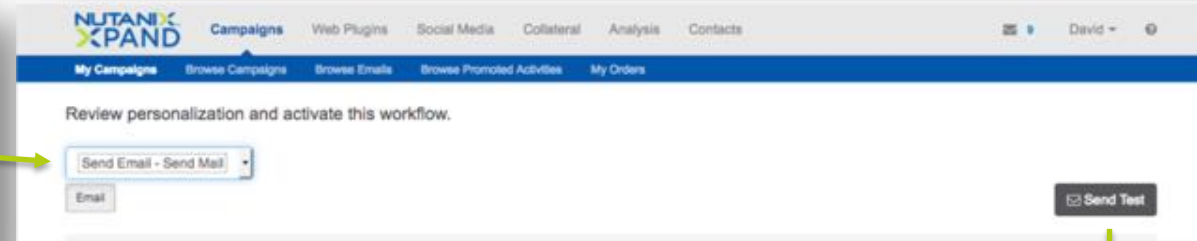
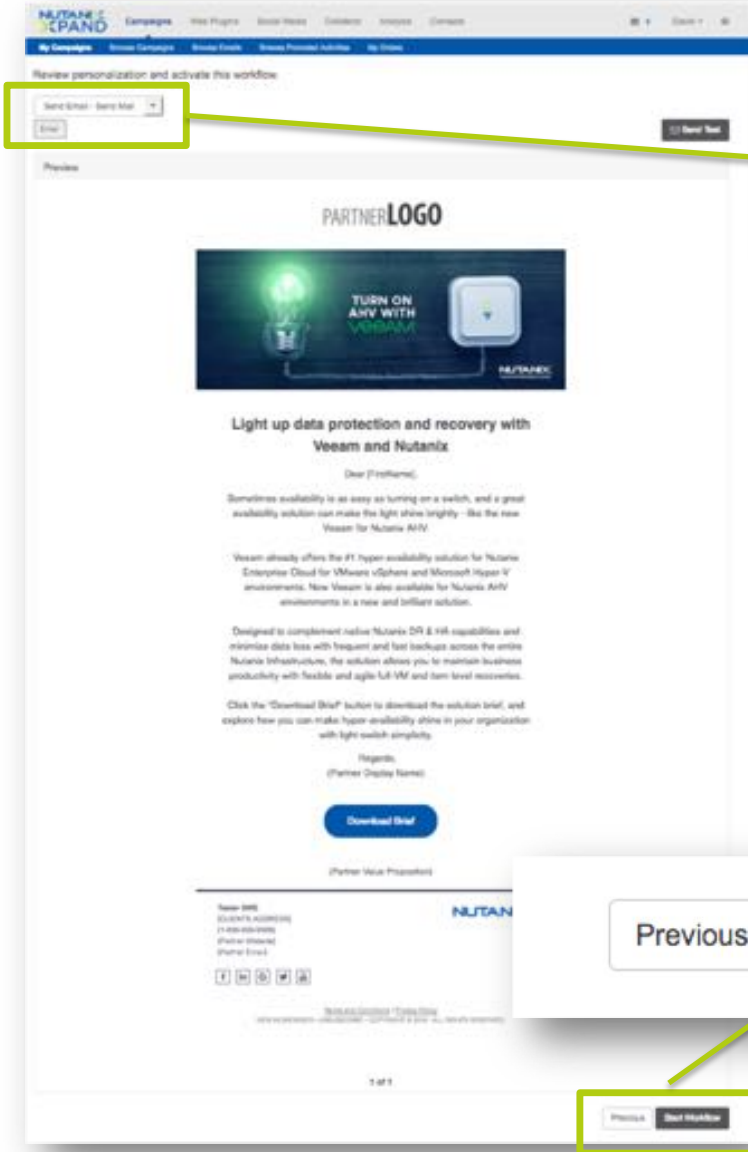
17. Assign a contact list in the 'Participants' tab.

XPAND lets you segment lists in a variety of ways: use the drop downs to sort by geography, solution preference, demographics, and even past activity. See the ['Membership Rules'](#) section for more detail.

Note: The more you execute in XPAND, the richer this data becomes.

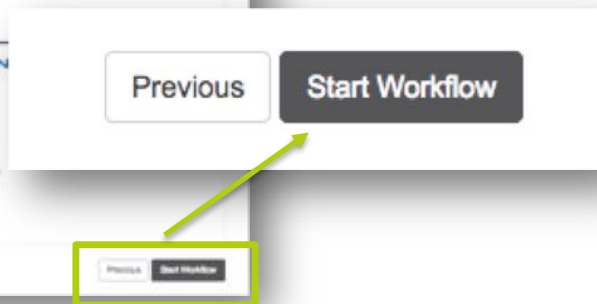
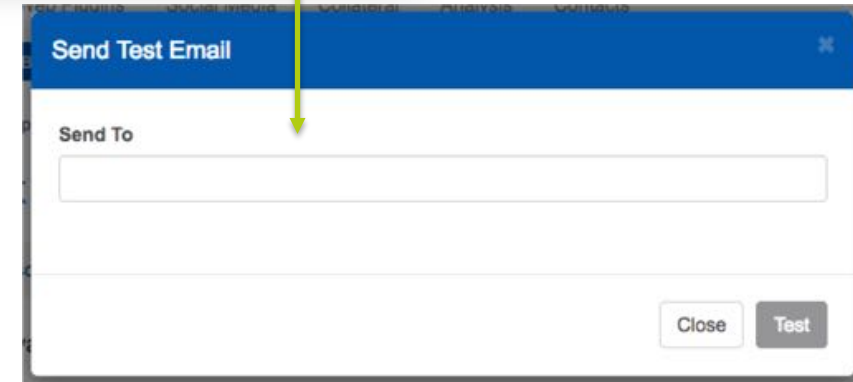
18. Click 'Save & Next'.

> Activating an email workflow (#8)



Tip: before going live, test the workflow using the 'Test Workflow' button.

19. Review your workflow one last time. Use the dropdowns in the top left corner to view each email. If you need to make changes, click 'Previous' and return to the wizard.



20. If you are satisfied with your email workflow, click 'Start Workflow'.

Your workflow is now live!

> Activating an email workflow (#9)

To review reporting metrics on a specific email workflow, do the following:

1. Go to 'Campaigns', then 'My Campaigns'.
2. Locate the workflow you wish to review and click into it.
3. In the dashboard, review leads, recent activity, and overall analysis.

The screenshot shows the Nutanix Xpand Campaigns dashboard. The 'Campaigns' menu is highlighted in the top navigation bar. Below it, the 'My Campaigns' sub-menu is also highlighted. The main dashboard area displays the campaign name 'Veeam for Nutanix Enterprise Cloud - AHV' and a 'DRAFT' status. A 'Last 12 Months' filter is visible. The dashboard includes a sidebar with navigation options: Campaign Dashboard, Reference Materials, Schedule, Leads, Recent Activity, Analysis (highlighted), and About. The main content area features a chart showing metrics over time (Sep 2017 to Aug 2018) and a summary table of metrics: Email Opens (0), Email Clicks (0), Web Views (0), Web Clicks (0), Form Submissions (0), and Leads (0). Below the summary table, there are sections for 'Recent Activity' (with 'Leads' highlighted), 'Top Active Leads by Email Opens' (showing 'No Results'), and 'Assets' (listing Website Plugins, Mailings, and Social Media).



Install Content Syndication Using Web Plugins

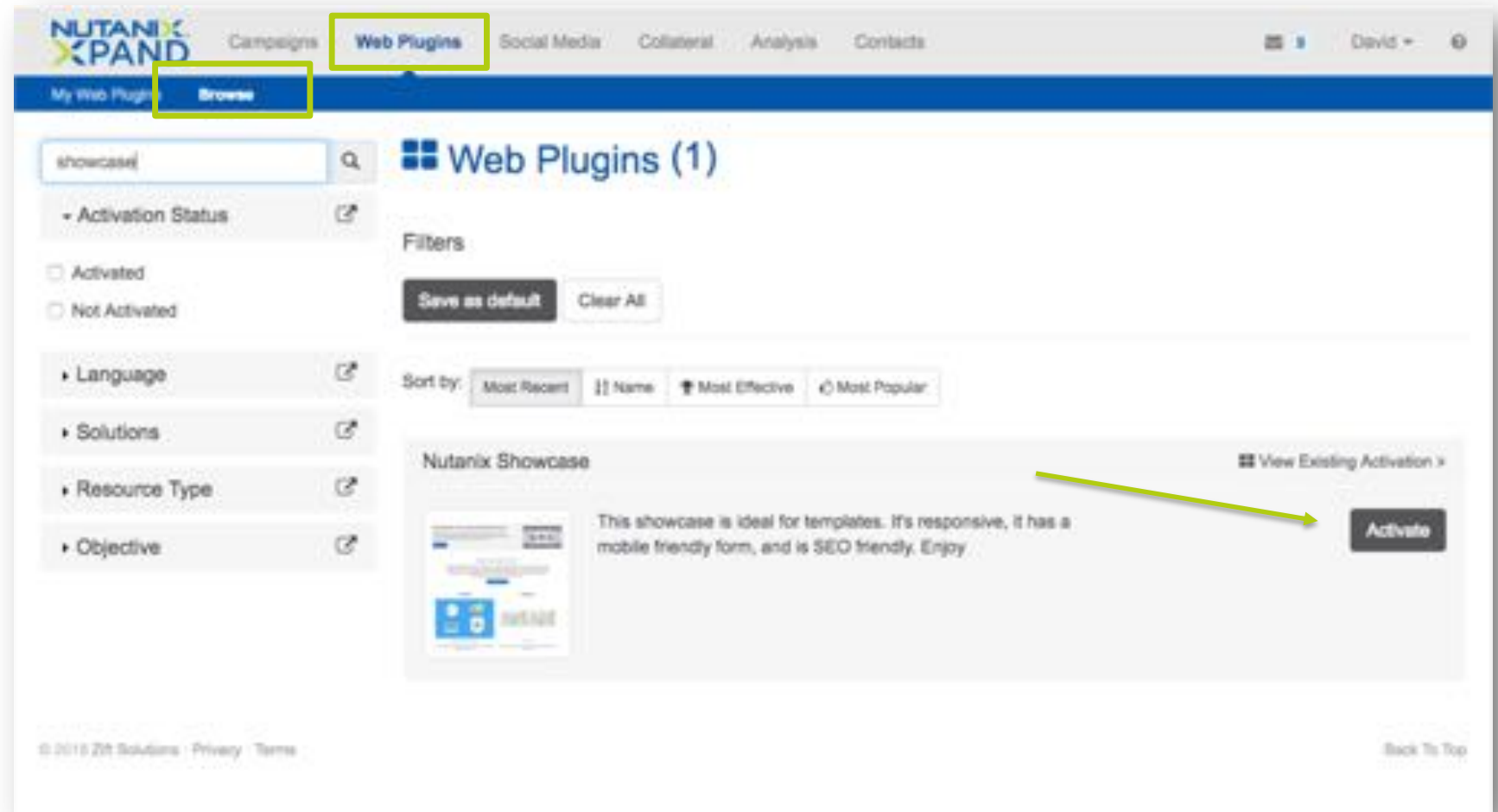
> Content syndication using Web Plugins

Content syndication makes it easy to showcase the latest Nutanix content on your website.

- Customize your Web Plugin including color scheme and contact information.
- Once your microsite or banner is installed, XPAND automatically pushes content to your website.
- This makes it easy to build your digital presence and convert your website visitors into leads.

> Embedding your Web Plugin (#1)

1. Click 'Web Plugins'.
2. Navigate to 'Browse'.
3. Search for the Web Plugin that best fits your marketing strategy. Click 'Activate'.



> Embedding your Web Plugin (#2)

4. You'll arrive at the Activity Dashboard. Click 'Review' to begin.

5. In the 'Setting' tab, name the tactic and update notification preferences.

The image displays two screenshots of the Nutanix Xpand Web Plugins interface. The top screenshot shows the 'Activity Dashboard' for 'Nutanix Showcase' with a 'Review >' button highlighted in a yellow box. A yellow arrow points from this button to the 'Settings' tab in the bottom screenshot. The bottom screenshot shows the 'Settings' tab with a 'Name' field containing 'Nutanix Showcase' and a 'Notifications' section with an 'Email' field and an 'Add' button. A yellow box highlights the 'Details' and 'Notifications' sections.

> Embedding your Web Plugin (#3)

6. Next, customize the Web Plugin under the 'Personalization' tab.

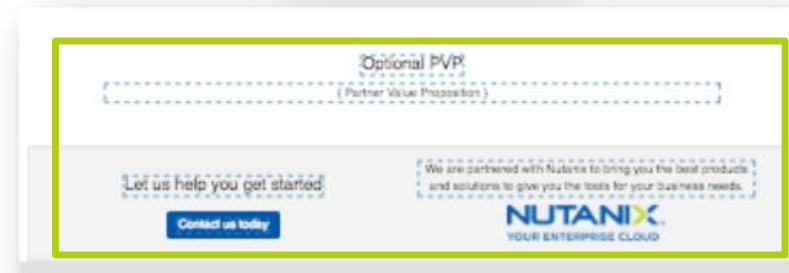
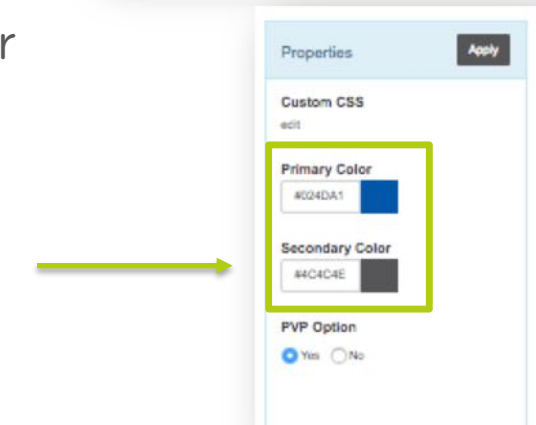
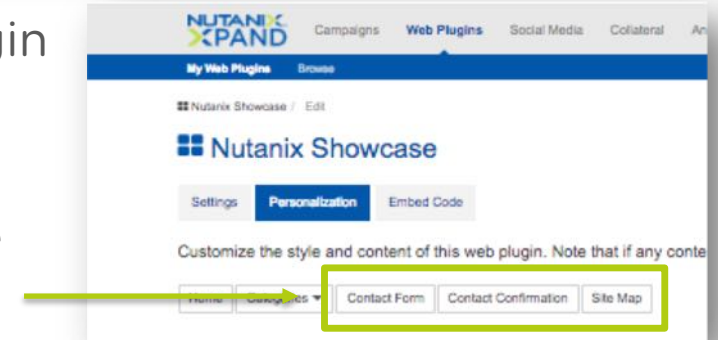
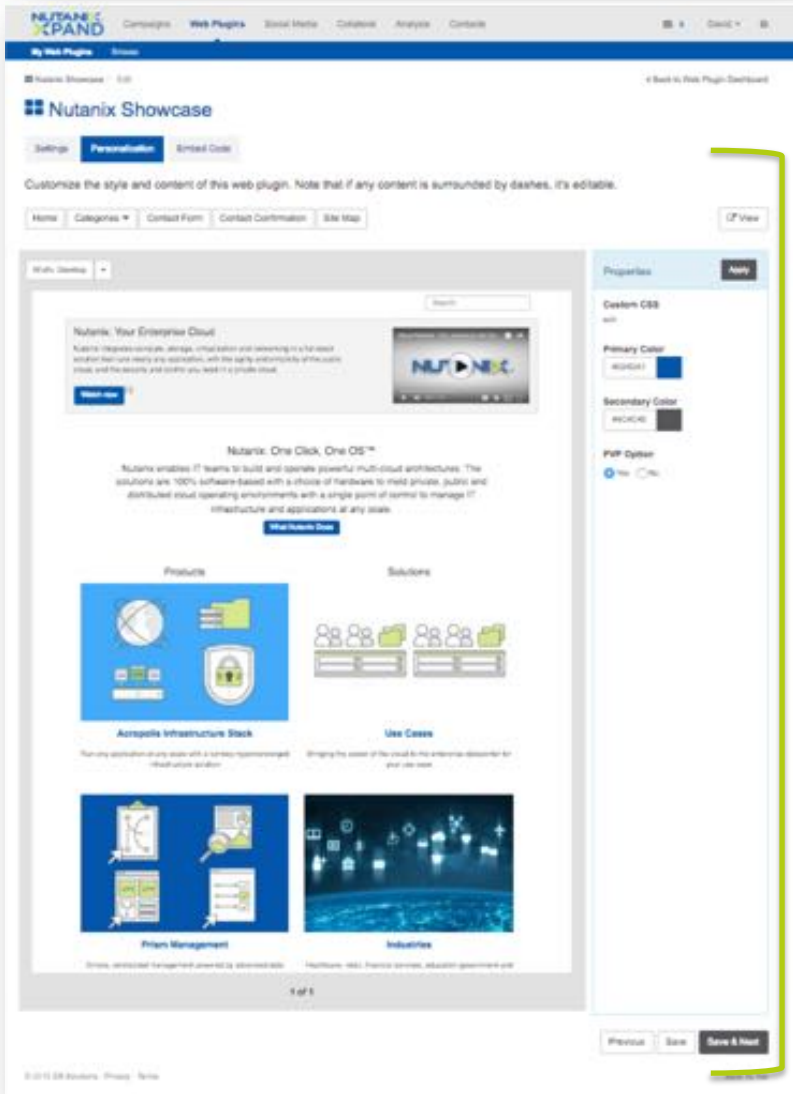
Be sure to review and customize each tab.

Change color schemes and other preferences in the 'Properties' toolbar. XPAND will remember these preferences, streamlining future customizations.

Any text surrounded in a dotted line can be customized.

7. Click 'Save & Next'.

Note: depending on the asset, you customization options will vary.



> Embedding your Web Plugin (#4)

8. Use the 'Embed Code' tab to install the Web Plugin on your website or digital media. XPAND provides a variety of embed options.

Once embedded, the Web Plugin is considered live.

9. Click 'Close' to return to the dashboard.

Note: The Web Plugin must be reviewed entirely before embedding.

Embed Code

Email Embed Instructions

Standalone URL

Copy to clipboard

Simple Embed

Basic Javascript Option

Advanced Options

Email to your website administrator.

Or, DIY and copy to your clipboard.

Advanced SEO Options

The easiest way to include a panel into your site by having the line of javascript above added into the html file of the page that will show the content. While this makes it more likely for people to both spend more time on this page and to link to this page, there is a technique that you can use to get an even greater SEO boost. This involves including your syndicated marketing content on the server in a server side language instead of having the syndicated marketing content resolved by the web browser. The first step to including a panel at your server is to select the server processing language your server supports.

- Server side - JSP
- Server side - ASP
- Server side - PHP
- Server side - ColdFusion

> Embedding your Web Plugin (#5)

To review reporting metrics on your Web Plugin, do the following:

1. Go to 'Web Plugins', then 'My Web Plugins'.
2. Locate the Web Plugins you wish to review and click into it.
3. In the dashboard, review leads, recent activity, and overall analysis.



Turn on Social Media Syndication

> Social syndication in XPAND

A strong social presence is critical to stay relevant in today's digital marketing landscape.

- XPAND makes it easy to build a social strategy with automated and curated content.
 - Multiple channels allow you to amplify your social presence.
 - With content written by our subject matter experts, you can position yourself as a thought leader.

> Start syndicating social content (#1)

1. Have your XPAND administrator log into XPAND.
2. Navigate to 'Social Media'.
3. Click 'Settings'.
4. Click "Add Account" and authorize your social account.

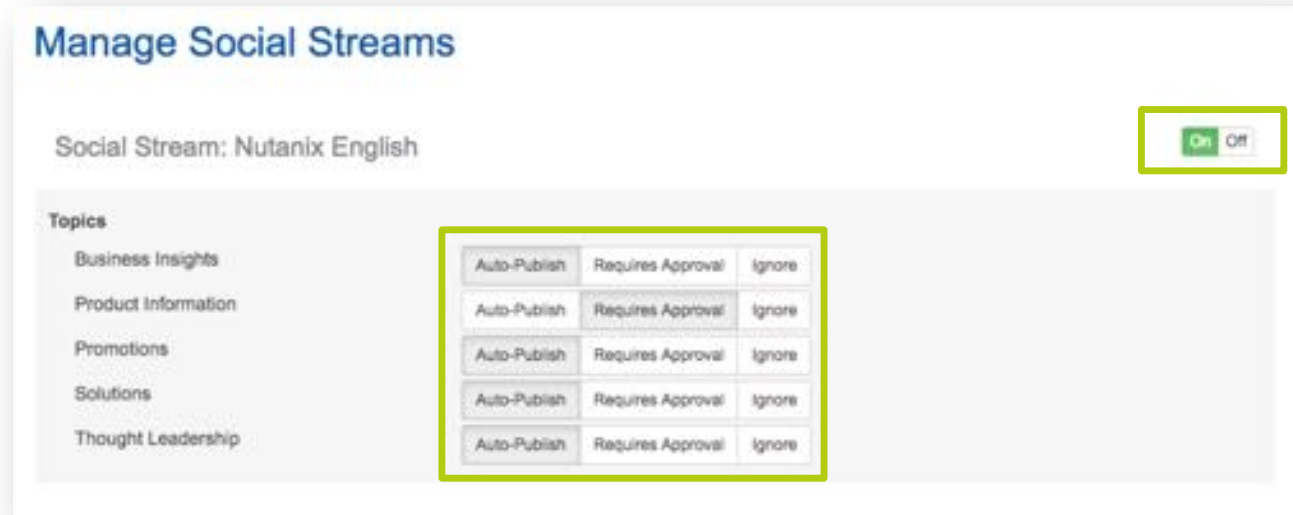
Note: We recommend only linking a business account to XPAND.

The image is a composite of three screenshots illustrating the process of adding a social media account to the XPAND system:

- Top Screenshot:** Shows the XPAND dashboard with the 'Social Media' tab selected in the top navigation bar. The 'Settings' link in the sub-navigation bar is highlighted with a yellow box. A yellow arrow points from this 'Settings' link down to the next screenshot.
- Middle Screenshot:** Shows the 'Social Media' configuration page. The 'Add Account' button is highlighted with a yellow box. A yellow arrow points from this button down to the next screenshot.
- Bottom Screenshot:** Shows a Twitter authorization dialog. The dialog title is 'Authorize Zift123 Platform to use your account?'. It includes fields for 'Username or email' and 'Password', and an 'Authorize app' button. A yellow box highlights the 'Zift123 Platform' information and the 'Authorize app' button. A yellow arrow points from the 'Add Account' button in the middle screenshot to this dialog.

The bottom screenshot also shows a list of social media accounts (Facebook, LinkedIn, Twitter, WeChat) with an 'Add Account' button above them. A yellow arrow points from the 'Add Account' button in the middle screenshot to this list.

> Start syndicating social content (#2)



5. Turn on a content stream. Toggle the content 'On' or 'Off'

6. Choose your approval settings for each topic:

- 'Auto-Publish': XPAND will automatically post content without your approval.
- 'Requires Approval': XPAND requires you to approve a social post before it syndicates to your account. Posts are approved in the 'Upcoming Posts' section within the 'Social' tab.
- 'Ignore': XPAND will not syndicate anything regarding this topic.

> Start syndicating social content (#3)

The screenshot displays the Xpand Social Media dashboard. The 'Upcoming Posts' tab is highlighted in the top navigation bar. Below it, a list of posts is shown for Thursday, August 23, 2018. One post is selected, and an 'Edit Social Post' modal window is open. The modal contains fields for 'Post Content', 'Post Image', 'Use Social Form', and 'Scheduling'. A yellow box highlights the edit icon in the post list, and another yellow box highlights the 'Edit Post' button in the modal. A yellow arrow points from the edit icon to the modal window.

7. XPAND puts you in complete control. Review future posts in the 'Upcoming Posts' tab.

To edit a post, click the edit icon. A new window will open.

Change the content, image, and scheduling time.

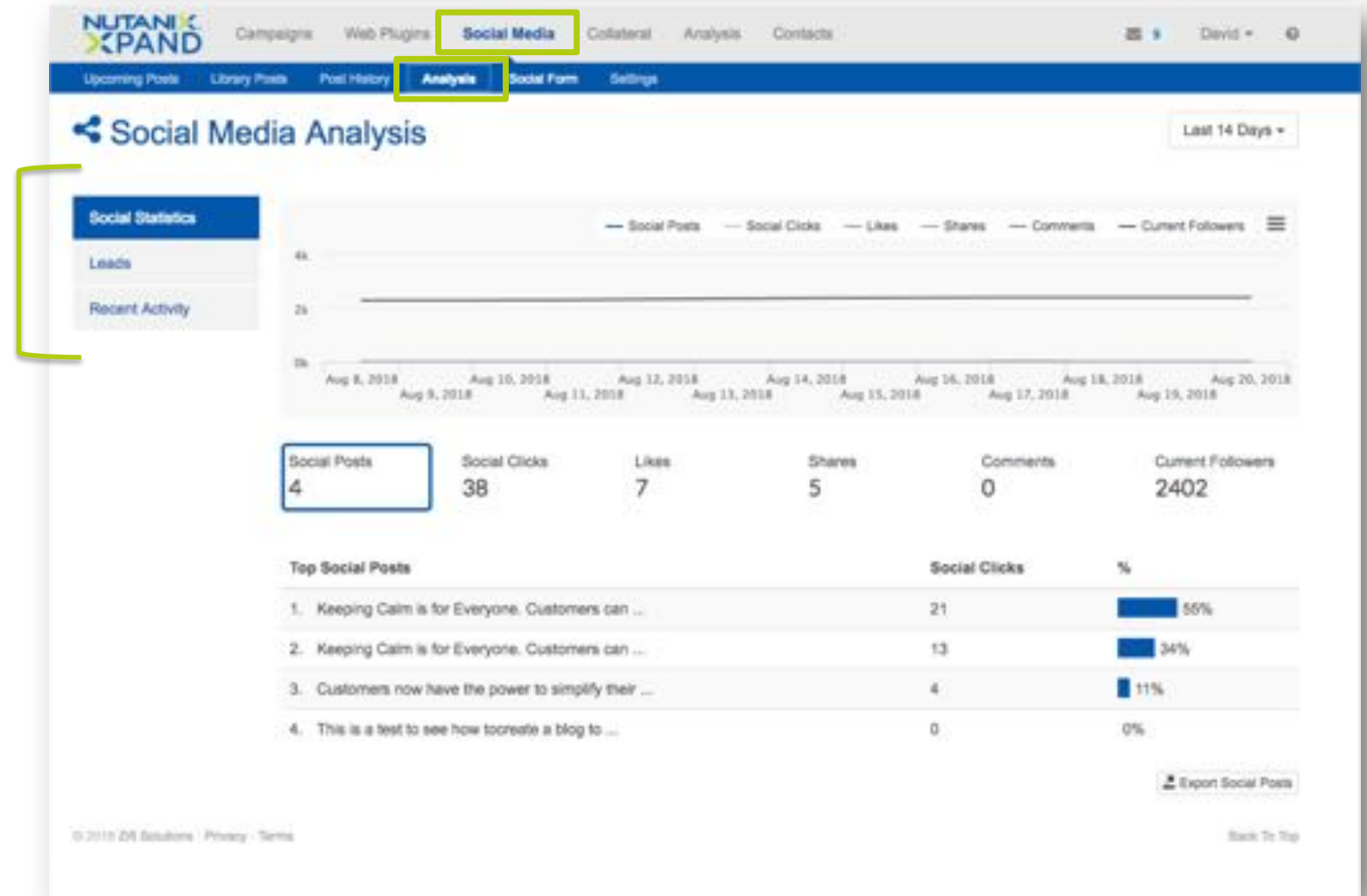
8. Click 'Save'.

> Start syndicating social content (#4)

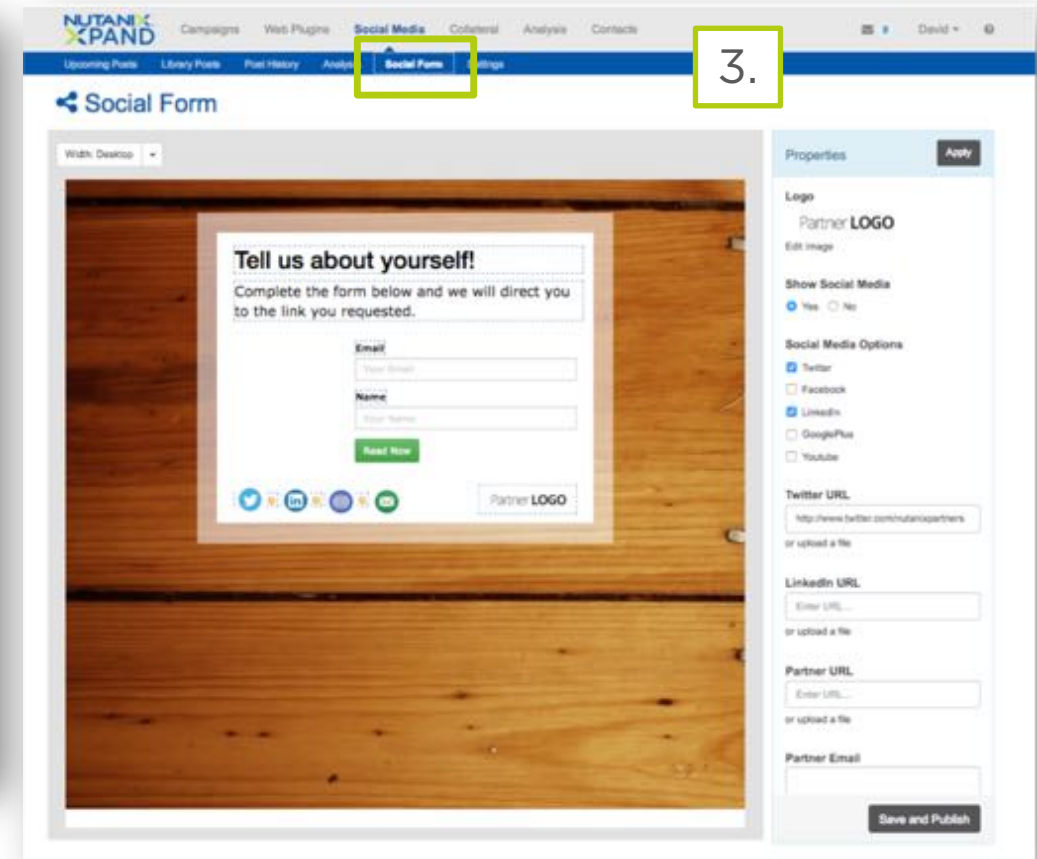
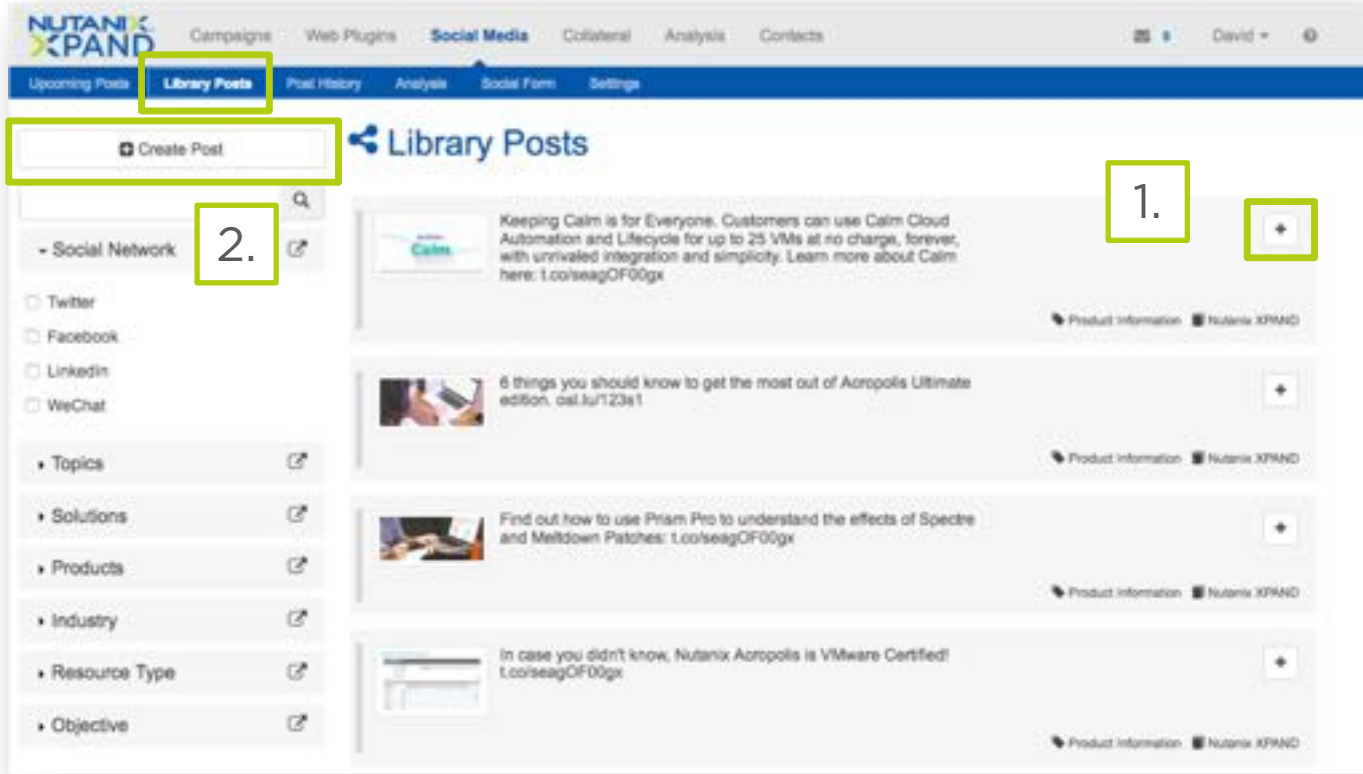
9. Once your accounts are linked and content is flowing, review social media activity. Navigate to 'Social Media' and click 'Analysis'.

Review overall statistics, leads and activity within the last 30 days.

Note, you can only access social analytics within the 'Social Media' tab.



> Start syndicating social content (#5)



3 other XPAND social features to consider:

- Access evergreen content in the 'Library Posts' tab. Simply click the '+' to schedule.
- Create a custom post using the 'Create Post' button. This is a great way to share about an event or unique offer but stay within the XPAND ecosystem.
- Gate your content with the 'Social Form' feature.



Download & Customize Collateral

> Exploring Nutanix content in XPAND

Download rich content for marketing campaigns, sales meetings, presentations and more.

- Many pieces are customizable, meaning you can add your logo and contact information directly to the document using the wizard in XPAND.
- Content includes advertising, analyst reports, campaigns, FAQs, guides, graphics, infographics, solution briefs and white papers.
- Mix and match assets based on your Nutanix marketing plan.

> Downloading content in XPAND

1. Navigate to the 'Collateral' tab and click 'Browse'.
2. Search by name or drill down using the search filters on the left.
3. To download, simply click one or multiple assets and then select 'Download Selected'. Or, copy to your clipboard and share.

The screenshot displays the Nutanix XPAND interface. At the top, the 'Collateral' tab is highlighted in yellow. Below it, the 'Browse' button is also highlighted. A search filter panel on the left is outlined in yellow, showing categories like 'Collateral Type', 'Resource Type', 'Language', 'Industry', 'Solution', 'Objective', 'Products', and 'Resource Type'. The main content area shows a list of collateral items, including 'Velocity - Freedom to Build Br...' and 'Veeam - Nutanix - Solution Brief White Paper'. A 'Download Selected' button is visible at the top right. A zoomed-in view of the 'Download' button and 'Copy Link to Clipboard' option is shown at the bottom right, with a yellow arrow pointing to it.

> Customizing collateral in XPAND (#1)

1. To customize an asset in XPAND, sort by 'Customizable' under 'Collateral Type'.
2. Once you find a PDF to personalize, click 'Customize'.

The screenshot displays the Nutanix XPAND interface. The top navigation bar includes 'Campaigns', 'Web Plugins', 'Social Media', 'Collateral', 'Analysis', and 'Contacts'. The main header shows 'My Collateral', 'Browse', and 'Programs'. A search bar is present, and the page title is 'Collateral (18)'. A left sidebar lists various filters: 'Collateral Type' (highlighted with a green box), 'Resource Type', 'Language', 'Industry', 'Solution', 'Objective', 'Products', and 'Resource Type'. The 'Collateral Type' filter is expanded, showing 'Customizable' (checked) and 'Download Only'. Below the filters, there are buttons for 'Save as default' and 'Clear All'. The main content area shows a list of collateral items. The first two items are 'Velocity - Freedom to Build Br...' PDFs, and the third is 'Nutanix Demo Print' PDF. Each item has a 'Preview' and 'Customize' button. A green arrow points to the 'Customize' button of the first 'Velocity' PDF.

> Customizing collateral in XPAND (#2)

3. You'll arrive at the collateral dashboard

4. Click 'Review' and the wizard launches with fields for your logo and contact information.

5. Click 'Save & Next'.

The screenshot shows the Nutanix XPAND interface. The top navigation bar includes 'Campaigns', 'Web Plugins', 'Social Media', 'Collateral', 'Analysis', and 'Contacts'. The main content area displays 'My Collateral' with a breadcrumb trail: 'My Collateral / Nutanix Desktop Virtualization Solution Brief / Activity Dashboard'. The title of the collateral is 'Nutanix Desktop Virtualization Solution Brief'. Below the title are buttons for 'Settings', 'Personalization', and 'Distribute'. The 'Personalization' button is highlighted with a yellow box. Below this, there is a text instruction: 'Customize the visual style and content for this collateral. Note that content within 'dashed boxes' is editable. Other personalization is available using the "Properties" panel.' A preview window shows a desktop view of the collateral with the Nutanix logo and the heading 'Simplify VDI with Nutanix'. To the right of the preview is a 'Properties' panel with an 'Apply' button and fields for 'Partner Logo', 'Partner Name', 'Partner Email Address', and 'Partner Address'. A yellow box highlights the 'Review >' button in the top right corner of the interface.

> Customizing collateral in XPAND (#3)

The screenshot shows the Nutanix XPAND interface. At the top, there's a navigation bar with 'My Collateral', 'Browse', and 'Programs'. Below that, the main content area is titled 'Nutanix Desktop Virtualization Solution Brief'. There are three tabs: 'Settings', 'Personalization', and 'Distribute', with 'Distribute' highlighted in a yellow box. Below the tabs, it says 'Distribute your personalized collateral.' To the right, there's a 'Download here' text with a yellow arrow pointing to a download icon in the preview window. The preview window shows a document titled 'Nutanix Desktop Virtualization Solution Brief' with sections like 'Simplify VDI with Nutanix', 'Key Benefits', and 'Customers'. To the right of the preview is a 'Distribute' panel with two URL options and 'Copy To Clipboard' buttons.

6. Finalize distribution settings.

Copy the first link.

This URL allows XPAND to track engagement whether you link it to an XPAND email or custom asset outside of XPAND.

You can also download the PDF using the download icon. Note: XPAND will be unable to track PDF engagement with this selection.

7. When done, click 'Close'.



Understanding XPAND Analytics

> A robust analytics suite

XPAND measures the success of your marketing campaigns. With its robust set of analytics, you can:

- Improve campaigns with visibility into tactic performance.
- Find out which combination of tactics works best.
- Identify new opportunities and 'hot leads'.

Outputs include impressions, opens, clicks, form fills, performance overtime, and lead data.

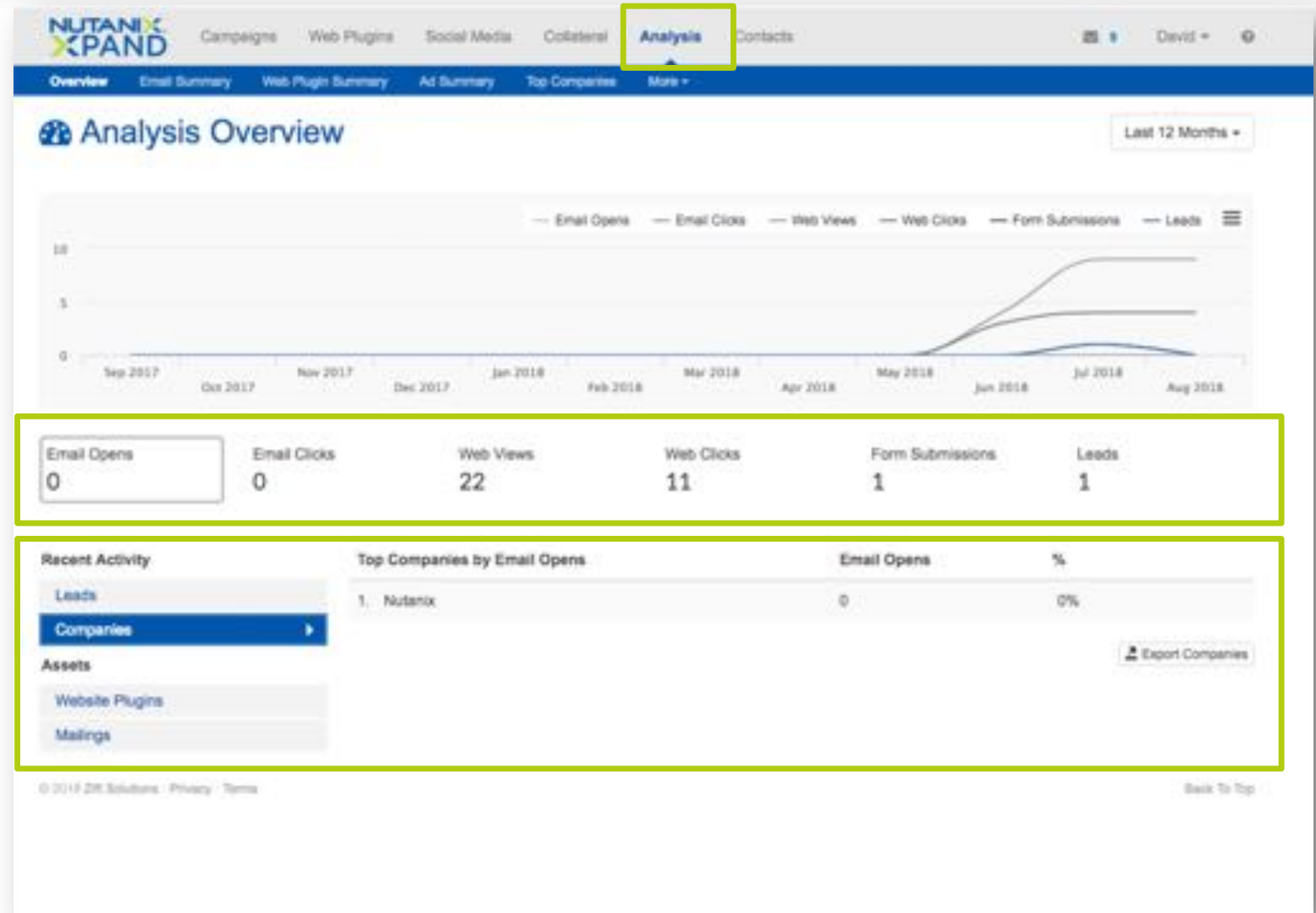
> Reviewing your analytics (#1)

To review your campaign metrics, navigate to 'Analysis'. You'll see an overview of all activity.

Click the modules at the bottom and sort through different analytic graphs.

Sort through recent activity with the metrics below the graph.

Note: all [social reporting](#) is found exclusively in the 'Social Media' tab.



> Reviewing your analytics (#2)

The screenshot shows the Nutanix Xpand Analytics interface. The 'Analysis' tab is selected, and the 'More' dropdown menu is open, showing options like 'Opportunity Details' and 'Recent Activity'. The 'Export All' button is also visible.

Company	Industry	Web Views	Leads with Activity	Total Leads
Nutanix			4	4
Totals			4	4

Options
 Send Now Send Daily Send Weekly Send Monthly

Export will begin processing immediately. You will receive a notification once your export is available. Report data will cover last 12 months.

Close Send Email

Report Criteria

Date Range
Last 12 Months

Group By
None

Column Chooser

Included

- Company
- Industry
- Web Views
- Leads with Activity
- Total Leads

Excluded

Cancel Apply

- Use the additional tabs in 'Analysis' to drill down on specific assets and demographic information.
- Under 'More', review lead opportunity details (note: optimize this setting by connecting your CRM) and an aggregate of recent activity in the 30 days.
- Customize your reporting criteria with the 'Edit Report' tab.
- You can also export and schedule reports using the 'Export All' tab.

➤ Reviewing leads

Contact Search (1 Found)

Sort by: Overall Lead Score Create Date Name

John Smith
john.smith@nutanix.com Nutanix Score: 0

The 'Contacts' tab also has robust reporting capabilities. Click on an individuals user's profile to see their activity including lead contact information, lead score, and marketing timeline.

To review your target companies, click 'Companies'.

0 0 0 0 1
Email Opens Email Clicks Web Views Web Clicks Submissions

Contact Profile

Email: john.smith@nutanix.com
First Name: John
Last Name: Smith
Company: Nutanix
Work Phone:
Opt-in Authorization:

Contact Score: 60

Leads for this Contact

Date	Lead	Lead Score
Jul 19, 2018	Initial interaction	54

Create Date: Jul 19, 2018 5:00:08 PM Update Date: Jul 19, 2018 5:00:08 PM

Timeline (3 events)

3 events total, 1 form submission(s), 1 inquiry to lead transition, 1 lead to MQL transition

Thu, Jul 19 5:03 PM, 1 inquiry to lead transition, 1 lead to MQL transition, 1 form submission(s)

> Reviewing campaign metrics

To review reporting metrics on specific campaigns, do the following:

1. Go to 'Campaigns', then 'My Campaigns'.
2. Locate the campaign you wish to review and click into it.
3. In the dashboard, review leads, recent activity, and overall analysis.

The screenshot shows the Nutanix Xpand Campaigns interface. The top navigation bar includes 'Campaigns', 'Web Plugins', 'Social Media', 'Collateral', 'Analysis', and 'Contacts'. The left sidebar contains 'My Campaigns', 'Browse Campaigns', 'Browse Emails', 'Browse Promoted Activities', and 'My Orders'. The main content area displays the campaign 'Veeam for Nutanix Enterprise Cloud - AHV' with a 'DRAFT' status and a 'Last 12 Months' filter. A legend at the top of the dashboard includes 'Email Opens', 'Email Clicks', 'Web Views', 'Web Clicks', 'Form Submissions', and 'Leads'. A table below the legend shows zero values for all metrics: Email Opens (0), Email Clicks (0), Web Views (0), Web Clicks (0), Form Submissions (0), and Leads (0). The 'Recent Activity' section shows 'Leads' as the active category, and the 'Top Active Leads by Email Opens' table is empty with 'No Results' and an 'Export Leads' button. The bottom sidebar lists 'Assets' such as 'Website Plugins', 'Mailings', and 'Social Media'.

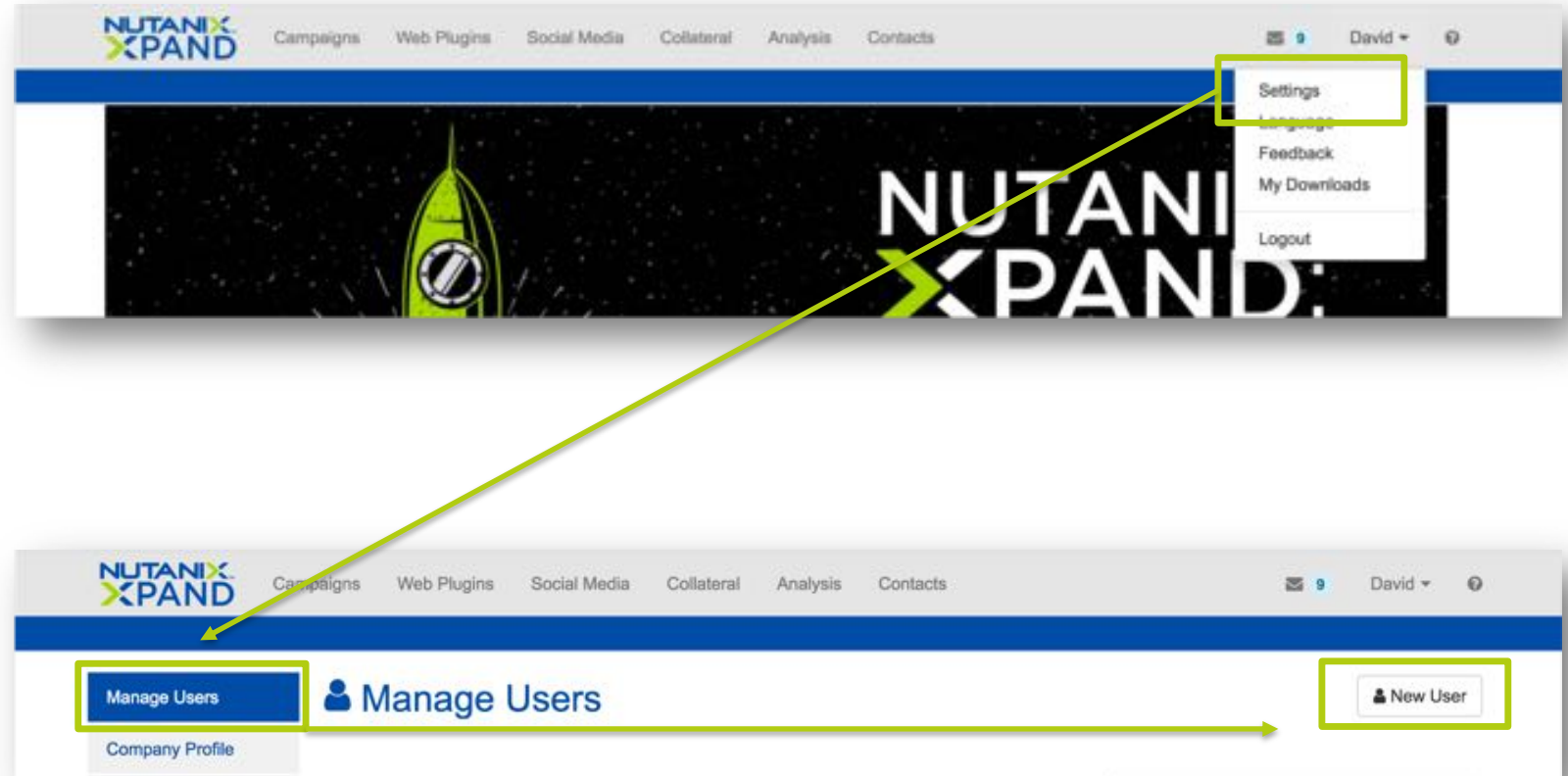


Adding a New User to Your XPAND Account

> Aligning new users to your XPAND account (#1)

Have your XPAND administrator log into XPAND. If you don't know who your admin is, email xpand@nutanix.com.

1. Click 'Settings' in the dropdown next to your name.
2. Click 'Manage Users'.
3. Then click 'New Users'.



> Aligning new users to your XPAND account (#2)

4. Enter the new user's credentials.

5. Select his/her role. Access varies per role:

Administrator: Users have access to account settings. This includes company profile, lead management settings, mailing credits, CRM settings, app connectors, social settings, etc. They do not have access to marketing activities in XPAND. Most users with the administrator role are also assigned the marketing role in order to allow access to all of the pages, features, and content in XPAND (**highly recommended**).

Marketing: Users have access to all features and content in XPAND, but do not have access to high-level account settings that administrators have, as described above.

Sales Representative: Users have limited access to the features and pages in XPAND. Users are restricted to seeing only their assigned leads' profiles and event timelines in the Contact views. Sales Representatives can work their leads either through XPAND, email or their CRM.

6. Click 'Save'.

Note: you can add up to 3 user admin accounts.

New User

Email
email

First Name
first name

Last Name
last name

Office Phone
office phone

Mobile Phone
mobile phone

Roles
 Marketing Sales Representative Administrator

Password
password

Confirm
confirm password

Close Save



Install Website Analytics

> Track webpage activity with Website Analytics

XPAND '[Website Analytics](#)' gives you insight on all visitor activity on all pages of your website. As contacts engage with both your XPAND marketing and website site, you'll see a holistic activity report in contact's timeline.

- Install the code on the your website footer to track all activity.
- Or, install it on a single page and track it individually.
- Tracking begins once the contact reveals himself, either by clicking on an email or completing any form. A cookie is then placed on the contact's computer and reporting starts.

> Install Website Analytics (#1)

Have your XPAND administrator log into XPAND. If you don't know who your admin is, email xpand@nutanix.com.

1. Click 'Settings' in the dropdown next to your name.
2. Click 'Install Analytics'.

The screenshot shows the Nutanix XPAND administrator interface. At the top, there is a navigation bar with the XPAND logo and menu items: Campaigns, Web Plugins, Social Media, Collateral, Analysis, and Contacts. On the right, the user name 'David' is displayed with a dropdown menu open, containing options: Settings, Language, Feedback, My Downloads, and Logout. The 'Settings' option is highlighted with a yellow box. Below the navigation bar is a large banner with the XPAND logo and a green leaf icon. On the left side, there is a sidebar menu with various options: Manage Users, Company Profile, Email Footer, Mailing Credits, SMS Credits, Contact Fields, Manage Templates, Social Media, Install Analytics (highlighted with a yellow box), Notifications, Tracking Options, Scheduled Reports, and Suppression List. The main content area is titled 'Install Analytics' and contains the following text: 'Website Analytics Embed Code', 'Status Unknown - Not Receiving Statistics', 'What is an embed code?', 'Similar to visitor tracking of specific syndicated website plugin assets, embedding this JavaScript within your web content allows Zift to track and report on visitors of your entire website.', 'How to use the embed code...', 'Copy the following code block into every webpage that you want to track immediately before the <body> tag. If your website has dynamic content then you should place the code snippet into the common footer.', and a code block containing the following JavaScript code:

```
<script type='text/javascript'>
(function() { var analytics_ = document.createElement('script');
analytics_.type = 'text/javascript';
analytics_.async = true;
analytics_.src = ('https:' == document.location.protocol ? 'https://' : 'http://') + 'static.ziftsolutions.com/analytics/930818162ad55750162b6550809940.js';
document.getElementsByTagName('script')[0].parentNode.appendChild(analytics_);
})();
</script>
```

> Install Website Analytics (#2)

3. Copy the code onto the footer of your website to track the entire site. Or, place it on an individual webpage and track it singularly.

You can also email the instructions to your website administrator.

4. Once installed, XPAND will begin to track website activity after an individual “reveals” himself. Reporting is sent to the individual’s contact entry.

Use this data to further nurture.

The screenshot shows the 'Install Analytics' page in the NUTANIX XPAND interface. The page has a sidebar on the left with various management options. The main content area is titled 'Install Analytics' and includes a 'Website Analytics Embed Code' section. This section contains a text area with the following JavaScript code:

```
<script type="text/javascript">
(function() { var zanalytics_ = document.createElement('script');
zanalytics_type = 'text/javascript';
zanalytics_async = false;
zanalytics_src = ('https' == document.location.protocol ? 'https://' : 'http://') + 'static.pfsolutions.com/analytics/180818162ad55750162d45555969e0.js';
document.getElementsByTagName('script')[0].parentNode.appendChild(zanalytics_);
})();
</script>
```

Below the code is a button labeled 'Email instructions to website administrator'. The page also shows a status message: 'Status Unknown - Not Receiving Statistics'.