Engage Functional Description

PRODUCT MANUAL | August 2023

1 Foreword

User is aware that this manual may contain errors or inaccuracies and that it may be revised without advance notice. This manual is updated frequently.

Marigold welcomes any recommendations or suggestions regarding the manual, as it helps to continuously improve the quality of our products and manuals.

2 Table of Contents

3 Introduction

Engage is a web-based marketing module combining easy design of templates, email-, mobile- and SMS messages with the actual sending of content in a wizard based or intuitive drag and drop interface.

Some of the features:

- Drag and drop interface for the creation of multi-channel content
- HTML design and import capabilities for content
- Wizard based creation of Single Batch, Recurring Batch, AB and Transactional Journeys
- Drag and drop interface for Custom built journeys
- Marketing cadence functionality
- Multi-language support
- High personalization capabilities in all channels
- Testing capabilities and clear validation feedback
- Library for storage of images and files
- List and segmentation management
- Automated exports, imports and SQL tasks
- Event-driven and profile-driven marketing campaigns
- System administration, such as user and user group management and permissions, mail domains, trackers
- Integration with social media channels

4 Plug and Play

Engage is fully web-based and can be accessed directly from your browser. It is compatible with Firefox, Safari, Chrome and Edge.

All tools can be accessed from one and the same location through the Modules section in the top toolbar. Single sign-on ensures a quick access to the different modules.

5 Online Help

Engage has an extensive and comprehensive publicly available online help, including examples for the different modules. You will find help and details on

- Engage
- Site
- Campaign

- Recommendations
- Data Studio
- Grow

The Help also provides access to **technical** documents, **What's new** release notes and **functional descriptions**.

An extensive learning section comprises complete **courses**, as well as feature-based video material and use cases.

6 User-Friendly Interface and Navigation

6.1 GRAPHICAL INTERFACE AND WIZARDS

Creation of content, journeys, lists and tasks is very intuitive as users are guided through the different steps by means of **wizards**. At all times, users know where they are in the creation process through the steps summary and they can jump to a specific step in the process to make changes.

Content is built from a **drag and drop** interface, where the different layout and content components are added to the message, building up the final content.

Custom **journeys** can equally be created from a list of available components. Drop these components on the canvas and link them to create the logic. Validation messages and intelligent links make sure there are no missing components and only valid links can be created.

6.2 START PAGES AND FLY-OUT MENUS

Start pages provide a global overview of the assets created in a specific chapter of the tool. A Toolbar at the top lets the user create new or filter existing assets directly from this page. A search button lets the user do a lookup in the assets listed. Depending on the chapter, the grid displays specific icons to perform tasks such as delete, edit, duplicate or pin an item.

The left navigator provides for each entry a **fly-out menu** from where the user has direct access to the folder structure and assets, as well as to the main actions, such as create and search. Moreover, pinned items and the most recently updated items are listed for better user experience. Fly-out menus can be pinned so they are always visible, or dynamically displayed when hovering the navigator.

6.3 FOLDER STRUCTURE AND SEARCH FUNCTIONALITY

With **Folder management** you can structure your assets in folders and subfolders. Folders are managed from the Start page overview of the different chapters (Content, Journeys, Lists, Library and Data Exchange) or from the fly-out menu.

Folders can be copied, renamed and deleted. Folders and assets can be moved to a different location as well.

When folders are created for one chapter, they will also appear in the other chapters so that the folder structure and logic are consistent throughout the application. Hovering folders will provide a full view of all assets stored in the folder, regardless the chapter you are currently in. This provides marketers with a complete picture on how their assets are being stored.

Use case:
- When creating a registration journey, all assets, whether it is emails, journeys, tasks, are stored in a single folder 'Registration'. Hovering the folder, will tell you all the assets already in there.

Folder management is also available for segments (in Lists) but in this case the folders only exist within that specific list. This lets you organize your segments in a logical way for the given list.

While building content and journeys, a **Folder Selector** allows easy search for assets when adding them as content to journeys, as Content Blocks to messages, etc. Here too, search, filtering and recent items are supported.

Search is available from the fly-out menu and from the Start page for each chapter. The search returns results from the current chapter only.

7 Multi-language Support

The Engage **interface** is currently available in **five languages**: English, French, German, Dutch and Spanish. Each user can configure the language of the tool in their profile.

In addition, **content can be created in different languages**. The languages available for selection upon content creation depend on the languages defined for the current Organization. You can add as many languages as required for the organization, and for each defined language content can be created. Templates, emails, Quick Starts, SMS, Mobile messages and pages can all be created in multiple languages. The message is created once, but for each component added, different content can be defined per language. And when sent out, each contact receives the message in their language.

Use case:
- Your Canadian audience is multi-lingual and includes French speaking and English-speaking contacts. Create a single newsletter with adapted content in the corresponding languages and send these out in the language of the contact.

Although the content will be different for each language, the **layout** of the message is **common** to all language versions. Text content, images, alternative text (tooltips) and links for these images, button captions and links, email headers, etc. can be defined for each language individually. But every language shares the same layout, including the layout of repeaters. Visibility constraints, variables, links, and data selections are also common to all languages. Only the resources used will be different from one language to the other.

Use case:
- Send out a promotional email in English and French, with product promotions and descriptions, adapted to the language of the contact. If promotions are not available in a certain language, they will not be listed. The layout of your promotional email is the same, independent of the language in which it was sent.

By creating content in multiple languages, you ensure contacts get the message in their preferred language. The contact's language is stored in the Audience List. Engage also supports situations where the contact's language is unknown or different from one of the configured languages. In that case the content is sent in a **default fallback language**.

Use case:
- A contact in your audience is 'Italian' but no Italian version of the promotional email exists. When this happens, you want to send the email in English and apply this rule to anyone with a non-supported language setting.

- A Shoe business sends a newsletter with recommended shoe articles and their description in the language of the contact. When no description exists in that language, the article is removed from the recommended items list as it makes no sense adding items in different languages.

Dictionaries can be created to provide the translation of commonly used words or sentences. By adding this dictionary label to a message, the content will automatically be translated into the right language for the message (eg. Mister, Herr, Monsieur, etc).

> Use case:
>
> - Use a 'Happy birthday' label for the subject of your message to automatically translate it into the right language. Adding this label saves you time when creating these messages in other languages.
> - Use a salutation label for the introduction to your message, E.g. Salutation label for Dear/Cher/Beste.

Moreover, for email messages and templates, a customized language-dependent **email header** (from-, to- , reply-address….) can be set. For multi-language emails you can use different from and reply addresses, aliases and a different email domain depending on the language and location. E.g. Messages in British English send emails from info@parana.uk while American English sends the same email from info@parana.us.

> Use case:
> - Your target audience covers multiple countries, with different languages. Communications sent to the different countries need to have different From and Reply addresses according to the language of the message. This way recipients of the message can get in contact with the correct department in their own country and language. For example, a contact in the UK will receive messages in British English, with a From and Reply address in the 'UK' domain, while a contact in France will receive messages in French but with a From and Reply address in the 'FR' domain.

8 Library of Reusable Content Elements

Images, files and pre-defined Content Blocks are managed from within the Library.

In the library, you can upload **images and files** and structure these items in folders and make them available to one or more organizations. Once stored in the library, you can use and re-use these items in your actual content.

Content Blocks contain a pre-defined set of text, images, buttons, variables, personalization fields, emojis, etc and can be used multiple times in the same message or in different messages. An HTML editor is available to enter the HTML content of a Content Block but you can also use special Engage tags providing built-in multi-language support.

> Use case:
> - Re-use the same standard header and footer in all your email communication. (Content Block is used as is)
> - Use a footer with company details, but different image of the office building per country (use of an image variable in the CB)
> - Disclaimers and legal text blocks.

Although Content Blocks are defined once and used multiple times, the final content or look of the Content Block can depend on **variables** filled out by the marketer in the message, allowing a reusable component to still look different depending on the message in which it is used.

> Use case:
> - Only display the content of the Content Block when a specific condition is met, such as a social button only being displayed when the message is marked by the marketer as a promotional message.
> - The Newsletter Edition date look, feel, size is defined in a Content Block but the actual value is set by the marketer in the message itself.

9 Content

9.1 DESIGN FROM SCRATCH

Design content in Engage's **full Design + Source Editor**.

Drag and drop content components (text, images, buttons, dividers, form fields...) to the Design panel where you can further edit the markup.
You can also use the Source editor to edit the source code. The source editor has line numbering, collapsing, autocomplete and color coding. In addition, a WYSIWIG editor in the source code allows you to make visual changes while being able to switch back to the source code and view the result.

The Editor can **extract text from HTML** automatically to create text emails. The text versions of the message can be manually adapted by the marketer.

> Use case:
>
> - Display a text version of the message when the message cannot be rendered in the email client.

9.2 IMPORT FROM HTML

Apart from designing messages, the Content editor can import **HTML files**. This means that you can design your messages in your standard authoring environments, like Adobe Dreamweaver or any other tool, and import them for use in Engage campaigns.

Upon import, images used in the source HTML file can be saved in the library for re-use later and HTML text and images can be automatically converted to Engage multilingual components. The latter lets you create different language versions of the HTML message.

> Use case:
> - A specialized marketing design partner designs your company templates, and you want to use these templates in Engage to create all your communications from.

9.3 SUPPORTED CONTENT TYPES

Engage has all your marketing channels covered.

Templates — Email templates can be created once and used repeatedly to create Single Batch Journeys with slightly different content. The layout and content can be partially or fully locked in the template to ensure consistency over the different communications. Unlocked content can easily be modified by the user in a drag and drop interface.

> Use case:
> - A typical example is a newsletter template where the structure and layout of the message is completely fixed and the marketer can only change the actual content items of this month's edition, manually or automatically.

Quick Starts — Quick Starts are pre-designed emails or pages, that are used to fast-track the design of new messages. These can be entirely customized by the marketer with personalization fields, variables, conditions, etc, and then used in any type of journey.

> Use case:
> - A typical example is a Quick Start where the header, footer, color scheme, fonts, etc are pre-created by a Design team, without being fixed, and the marketer can then fill this Quick Start with any content and adapt the existing settings where needed. There are no limitations to what can or cannot be edited.

Email messages — Email messages can be created from scratch in design or source mode, through import of an existing HTML, or copied from existing messages. When creating email messages, the user has full access to all components and content elements and can design or modify the email exactly as needed, with personalization fields, variables, conditions, etc. Email messages can be used in any type of journey.

SMS messages — SMS Messages are sent to the mobile numbers of the audience contacts and can use basic personalization from the contact's profile as well as emoticons.

> Use case:
>
> - An order confirmation
> - Confirmation of an appointment

Mobile notifications — Engage supports push notifications and in-app messages. These messages are sent to the devices that have installed your app. Personalization is possible with emojis and fields from the Audience list. In-app messages can contain up to three buttons that redirect the user or launch an action. Different content types can be used to create the in-app notification, such as a URL, plain text, richt text, an image, a page and even a Smart Content.

> Use case:
>
> - Free delivery today! notification
>
> - Information on a new update of the app

Pages — Pages can be created from scratch or by importing an existing HTML. A drag and drop interface allows designing the page in Source mode and in design mode. Basic forms with text boxes, radio lists, check boxes, buttons and so on, are supported.

> Use case:
>
> - A registration form presented to the contact after clicking the Subscribe button in an email.
> - A page with recommended items, embedded in your website.

9.4 CONTENT BUILDING BLOCKS

Content can be designed from a series of standard building blocks such as text, images, buttons, dividers, spacers, repeaters, forms, video, barcode and predefined Content Blocks and Smart Content.

These building blocks are added quickly to the message by drag and drop, and properties are easily set and immediately reflected on the design panel.

Repeaters let you define the basic structure of your dynamic items in the message, how many should be shown, what layout should be used, and which items should be listed. These items are added either manually by the marketer upon message creation or filled out automatically based on filters and matching criteria. Repeaters draw content from a data source that can be used across all your messages.

> Use case:
> - List the top 10 most recent news articles in line with the reader's points of interest.
> - Suggest a recommended product from the catalog, based on the reader's historical purchase behavior.
> - Highlight the 5 best restaurant deals in the reader's area.

Moreover, Engage provides the possibility to re-use specific content through the one-time definition of **Content Blocks** in the library. These Content Blocks are predefined, can contain personalization fields, emojis, links and variables and can be used as many times as required in one message or in multiple messages.

Smart Content on the other hand contains recommended content based on algorithms. This Smart Content is configured once in the Recommendations module and can be used in multiple messages.

> Use case:
> - Based on previous general surfing behavior, a specific item can be recommended to the contact.

9.5 CONTENT VALIDATION

Before you can use content, it is validated thoroughly to ensure consistency throughout the different language versions, ensure all building blocks have content in them, email headers have been filled out, all links are working, a text version exists and more.

You are informed through warnings, errors and informational messages and if you click on a validation message, you are taken straight to the element causing the warning.

Blocking errors will prevent you from publishing and using the content. Warnings and informational messages are non-blocking. Only when all blocking errors have been solved, the message can be published and used in journeys.

9.6 CONTENT FEATURES

9.6.1 PERSONALIZATION

Personalization features offer unmatched flexibility to create highly targeted communications with the least effort. Based on easily available **contact information** stored in the Audience lists and linked lists, messages are enriched with personalization fields.

> Use case:
> - Address your contacts in the message by using their first names and use their preferences to personalize the content of the message.

Moreover, **emojis and system variables** are at hand as well as a whole set of **functions** that allow you to personalize your content even more.

> Use case:
> - Add the current date to your newsletter

By means of **visibility constraints**, sections of a message can be hidden or shown, allowing creating one single message for different target groups.

> Use case:
>
> - Display a contact's loyalty points in a newsletter but only for contacts who have a loyalty card.

When certain words or phrases pop up regularly in messages, these can be stored as **labels** in a dictionary, and then used to personalize your messages while at the same time applying the correct translation.

> Use case:
> - Add a salutation label, such as 'Dear customer'.

- Add the legal disclaimer to all messages. Depending on the language of the message, the corresponding translated disclaimer is displayed.

Easily define **subject lines and pre-headers**. Create different versions of the subject line and pre-header by setting conditions based on contact profile information.

> Use case:
> - In your promotional message, tease your audience interested in gadgets with a subject line promoting fancy new gadgets in the catalog, while using a different subject line on wellness products for contacts expressing their interest in well-being.

9.6.2 TRACKED LINKS

When links are added to the content, they are by default tracked. Each time a contact clicks a link, the click is stored and used in the reporting. A link can point to an URL, an element in a journey or the action can be defined in the journey itself. Interaction on these links can be used to steer a contact to a certain path in the journey.

> Use case:
> - Set a link to the webshop in your newsletter and check the reporting on how many people click through to the website.
> - Add a subscribe button to a promotional email. When clicked, the contact is guided through a registration process, filling out details and while being registered in the system.
> - Send an email with instructions on how to become a gold member. A question 'is this information helpful' is added with 2 buttons. Yes and No. Clicking Yes, presents a Thank you page, clicking No takes the contact to a feedback form.

9.6.3 LIVE CONTENT

Live Content includes several widgets that will make your email messages and pages more personal and make them stand out. Content is dynamically loaded at email open time or when viewing the page. The following are supported: Social widgets such as Twitter, Weather and weather forecast widgets, countdown timers, webscrape images, nearest store information and automated content.

The use of these widgets is simplified by means of predefined templates that define the look and feel of the final image displayed.

> Use case:
> - Display the latest company tweet in your email communication.
> - Send out a promotion on clothes and add a map with the nearest store details.
> - In your newsletter with new travel destinations, include the local weather forecast.

9.6.4 VERSION MANAGEMENT

For easy follow-up on the different versions of a published document, a history is provided, including the date of publish and the user who performed the publish. A preview of each version is available as well.

When needed, an older version of the document can be restored and replace the current version. Also, a copy of any of the versions can be made and worked on.

9.6.5 DOCUMENT AND CONTENT PROTECTION

Locking exists on multiple levels: document level and individual content elements in the document.

The moment a user starts working on a message in Edit mode, the document is locked for other users. When another user attempts to access the document, they are informed that it is being edited by another user but they can override the lock. This is a soft-lock.

On the other hand, individual template content components can be locked as well, protecting the set structure and layout of the message when used in a journey. This is a hard lock and users will not be able to make any changes to the locked elements.

9.6.6 APPROVAL MANAGEMENT

To make sure the right content is sent in the right format, an approval process ensures that content is validated before it can be used in journeys. The process includes approval requests followed by either an approval or a rejection. Rejected content goes back to the design table.

9.7 TESTING CONTENT

Previews give the user already a good idea of what the final message will look like. Depending on the type of content, messages can be previewed on mobiles, tablets and desktops. For mobile messages a preview is available for IOS and for ANDROID.

Dynamic and personalized content in the message will be filled out based on the profile of the selected test user. Even the language of the test user will have an impact on the final preview.

Test messages can be sent to one or more test users. This allows you to thoroughly test personalization, languages, visibility constraints, layout and so on.

Finally, with Engage's built-in **EOA integration**, all emails can be previewed in over 20 email clients, browser and device combinations. This also includes **spam test** reports on all major spam filters such as SpamAssassin, Barracuda, Postini, Symantic Cloud, Gmail, Outlook and more.

9.8 CONTENT PUBLISHING

When the message is ready, besides saving it, you need to **publish** it to make it available for use in journeys. This allows the marketer to create drafts of the message and test it extensively before making it available. When the message is published a validation is done automatically. If the validation still returns error messages, the message cannot be published.

Changes made to the message after it has been published will not be visible until the next publish takes place.

9.9 ACCESSING CONTENT

Apart from sending out messages (emails, SMS, mobile) to contacts in journeys, web pages can be made accessible in other ways as well.

First, contacts can access pages directly when clicking links in a message.

> Use case:
> - In a subscription email, the contact clicks the Subscribe link and is redirected to a registration form.

Secondly, the webpages can be made accessible online, on a website for instance to anonymous contacts, by using the page **URL as a hyperlink**.

> Use case:
> - On your webshop, add an option for the visitor to be informed when sales are planned. When selected, the visitor is redirected to a page to fill out details and points of interest.

But these pages can also be integrated in your website, for known and anonymous profiles, thanks to the **content rendering** module that allows displaying a Engage page with the look and feel of the website. The website builder can decide where this page should appear.

> Use case:
>
> - Create a page with best-selling items and integrate it in the webshop.

Moreover, when there is an integration with the Site module, Engage pages can be displayed as offers on the website as well.

> Use case:
> - Displaying a Loyalty Program banner to Engage identified visitors (visitors that have a contact record in Engage) and who do not yet have a Loyalty card.

10 Journeys

Journeys contain the actual execution logic of the campaign; it is where messages are sent, interaction is tracked, data is updated, and follow-up can be treated.

10.1 JOURNEY TYPES

Transactional journeys are only executed through the API and use a transactional email, mobile or SMS message. A transactional message is sent in response to a customer request (such as registering on your website, making a purchase). They can be personalized with transactional fields that are passed on by the API.

> Use case:
> - A confirmation email with an overview of all ordered products.
> - A shipment confirmation with a track and trace code and the nearest store widget.
>
> - An SMS reminding about a booked appointment.

If you want to send out a **one-time message**, you can use a **Single Batch Journey**. SMS, mobile push, and emails can be sent out to an audience or segment of that audience, immediately or at a scheduled time. If you start from a template, the layout and structure is partially or completely fixed but the user will still be able to make modifications to the message if the template allows it.

> Use case:
> - Send a weekly newsletter with the latest news articles. The layout and structure of the newsletter is fixed in a template and marketers use that template to send out the weekly update. The top section of the

message is filled out with the top 10 most viewed news articles, while a second section contains articles corresponding to the reader's favorite categories.

- A one-time invitation to a customer event.

A **Custom Journey** is used for more complex logics, where interaction in messages is captured and used to move through the journey, where special actions such as database updates are required or a more custom approach is needed. The flow between these steps is created by dragging components onto a canvas and linking them together to form a marketing flow chart. The user can define events that trigger steps in the journey and use customer interaction to define the path. Custom Journeys allow a great deal of flexibility and can be used to achieve complex scenarios.

Use case:
- Target the 100 biggest spenders in your audience with a 5-star promotion while all others do not receive anything. (Control groups)
- Invite the most senior member of the 10 most earning families to a special sponsorship event. (Control groups)

- Send out emails for ticket sales in batches of 1000 emails per hour.(Wave)
- Randomly target 10% of your audience with free vouchers. (Sample)

- Target the first 1000 contacts in your audience whose favorite shop is in a specific location. (sample)

- In preparation of a customer event and based on the preference of the contact information on customers being present on the customer day and on which day of the weekend that were there, either Saturday or Sunday. Based on their presence on a specific day, a slightly different message is sent. (Split based on audience data).

- Ensure the highest view and click rate by sending out messages at the best optimized time for the contact. (Delivery optimization)

- Check daily for new contacts in your audience and update your social audiences such as twitter, facebook, google and snapchat. (social components)

- Check for the contact who is registering if a record already exists and return a warning when this is the case. (Lookup)

- Retrieve the most recent order for a customer and suggest products in the same category. (Lookup)

- 3 slightly different versions of a promotional email are sent out to 15% of the audience. The one generating the most orders, is sent to the remaining audience. (AB together with Webtracker)

- Card expiration - A specific card expiration message is sent with card details to holders of credit cards. The audience is selected based on data in an Event List that is loaded from an external system. (custom event)

- Handle all your unsubscriptions in a single journey and redirect all other journeys to this one. (redirect)

When you want to test how different versions of a message are perceived by a test audience and which one generates the best result, **AB-journeys** can be used to test up to seven messages. You can then pick the one with the best result and send this best version to the remaining audience. The best result can be based on criteria such as the number of clicks, views, revenue generated or orders.

Use case:
- Send out an invitation with 2 different subject lines to 2 test groups of each 5 %, check which one is the most clicked and send the best email to the remainder of the audience.

Recurring Batch Journeys are journeys that can be executed at recurring moments in time. A typical example is a birthday campaign where an email is sent to all the contacts having their birthday today. This journey is executed every day for a selection of the contacts in the audience.

> Use case:
> - Perform a daily check on which customers have exceeded the 100 loyalty points and reward them with a gift.
> - Send birthday wishes to all contacts having their birthday today. The journey is executed every day of the year at 08:00 in the morning.
> - Every day, from the 15th of January to the 13th of February send out a Valentine contest to win a 50$ flower voucher. The first ten participants will get a voucher.
>
> - Once a month, send a summary of all items purchased but only to contacts who have at least one purchase registered for that month.

10.2 JOURNEY VALIDATION

Throughout the whole process of creating a Custom Journey from scratch, validation is performed, ensuring that every journey component added has all the required settings, and every link drawn between components is allowed and makes sense. Through clear validation messages, the user is informed where problems occur and thanks to the interactivity of these messages, clicking one will take the user straight to the element causing problems.

10.3 AUDIENCE VALIDATION

Journeys are executed for a specific audience. Thanks to a built-in audience validation, the user launching the journey is informed of what is sent and to how many targeted contacts. He needs to confirm this before the journey is launched, but if the numbers do not seem to be right, the user can still cancel the launch.

10.4 JOURNEY PUBLISHING

Custom journeys need to be published to make them available. For example, journeys can only redirect to other published journeys. Or, when defining tasks that trigger a journey, only published journeys can be selected. This allows the marketer to create journey drafts without these journeys being at risk of being used. When changes are made to an existing published journey, the journey needs to be published again in order for the changes to be included.

10.5 JOURNEY EXECUTION

Each journey can be activated, paused, cancelled or taken offline with a single click.

When a journey is **activated**, all contacts in the target audience will receive the message, either immediately or at the scheduled time. If the journey is a Single Batch Journey, the execution will pause after the message was sent to each contact. For recurring journeys, the target audience is checked with each execution interval.

Journeys can be **paused**; no messages are sent, but webpages are still accessible. Paused journeys can be relaunched.

Cancelling a journey will cancel the execution. No new messages are sent out anymore and if messages are still being processed at the time of cancellation, best effort is made to ensure they don't reach the inbox of the recipient. The links in already sent out emails will keep on working as well as the pages in the cancelled journey. Cancelled journeys cannot be relaunched.

When the journey is **taken offline**, no emails are sent, and webpages are no longer accessible. Clicks leading to these assets will redirect to a defined location. This can be an URL, another webpage or another journey. E.g. if a contest ends, redirect contacts to a "Contest ended" webpage.

Journeys can be paused, taken offline and **restarted** at any time. When a journey is paused, you can modify or optimize the journey however you want. As soon as you restart the journey, sending messages will immediately resume where it left off.

Recurring Journeys have starting and ending dates and they can be **planned precisely** for execution at a recurring moment in time.

10.6 CREATE, MODIFY, DELETE JOURNEYS

Create journeys graphically via drag and drop of components, or use the fast-track and create Single Batch, Recurring, Transactional and AB journeys via wizards. Existing journeys can be modified when paused. Journeys can be deleted, unless they are used somewhere, for example in Tasks. In that case, the user is informed, and information is given on where the journey is used.

10.7 REUSE JOURNEYS

Journeys can be **duplicated**, with a single click on the Journey dashboard.

For Single Batch, Recurring Batch and AB Journeys, all settings are duplicated: journey properties, audience selection, components used. The message used in the journey is duplicated as well.

When duplicating Custom Journeys, the assets used in these journeys can be duplicated or not. The marketer can decide on that for each journey individually. When assets use data selections, the new assets will use the same data selections.

Several journeys can be part of a single marketing campaign, each journey being a small part of the complete scenario. **One and the same journey can be used in multiple scenarios as well**.

> Use case:
> - Use one and the same unsubscription journey for all your communications. the unsubsribe link in every newsletter points to a single journey that handles all unsubscriptions.

10.8 TESTING JOURNEYS AND MESSAGES

In general, Journeys cannot be tested as such, but the messages used in the journeys can.

See section Testing Content.

However, Custom Journeys with an Input component can be tested. When adding the component to the journey and publishing the journey, a link is available through which the journey path can be tested for an anonymous user. This allows you to go through the different steps in the journey and test the outcome.

10.9 CADENCE MANAGEMENT

Cadence Management lets you manage the load of messages sent to your audience over a given time. It is a very important tool that helps you avoid customer fatigue and prevent unsubscribing from your audience. It is important to keep your audience informed and engage with them on a regular basis but too much information is as bad as no information.

With Cadence Management you can balance the load of messages sent for each channel individually or over all channels. You can set the rules and determine how many communications you want within a given time frame. Also, when multiple campaigns are running, one can take priority over the other.

> Use case:
> - Every week you send out a promotional email. At the same time, there are monthly newsletters. When the monthly newsletter is sent out, you do not want to send another promotional email. This week, that email will be skipped.
> -You have multiple brands with multiple campaigns running, using different channels. SMS is considered as quite invasive, and you want to limit these to maximum 1 every month.
> - Your company is sending out general communications as well as brand related communications. You want to make sure; the contact only gets one communication a day and that the general communication gets prioritized.

10.10 SELECT & OPTIMIZE

Engage provides many ways to optimize the targeted audience and the journey, so only relevant people are contacted and go through a certain path in the journey.

Within a journey the **Split** component can change the path of the contact, using the contact's stored profile data, a constraint, an expression and custom event data . Based on the outcome, which can be a yes or no outcome, or a specific constraint being met, the contact will take a different path in the journey.

> Use case:
> - The contact indicated their interest in your annual customer day, happening on Saturday, and will therefore receive an email with the program for that day. Contacts who indicated their interest in Sunday will get the corresponding program for Sunday.

Validation Components will check one or more conditions and depending on the result choose a different path in the journey.

> Use case:
> - Check if the contact has at least 100 loyalty points and send them a reward. If not, send them an incentive to collect more points.

Furthermore, **audiences** can be filtered to have a more targeted approach and create journeys with a maximum effect but also only include contacts that really need to get a specific communication and avoid unhappy customers.

> Use case:
> - Only send feedback forms to your contacts who clicked on a promotional link less than 7 days ago.
> - Exclude from any promotional emails all contacts that have not opted in for the promotional email.

Moreover, you can limit the audience even more, and target only a **sample** of the audience, based on a specific number of contacts or a percentage.

> Use case:
> -You have a recurring journey that sends out a Promotional email with some free vouchers every day. You only want to send it to 100 contacts in your list who have indicated they are interested.

Some actions only need to be performed after a specific event happened. Imagine an invitation email being sent, and you want to follow-up on this after a given time delay, this is perfectly possible with the dedicated **Wait** component.

> Use case:
> - You invited the customer to check out a new shop in their area. After a few weeks, you automatically send an email with a questionnaire to get their feedback.

In addition, messages can be sent at an optimized time. By adding the **Optimized Delivery Component** to the journey, Engage will send out the messages at the best optimized time for each contact.

> Use case:
> - Your customer is mostly active in the morning around 08:00 and you want to make sure your emails are sent around that time to optimize the interaction with that message.

Sometimes, not all messages need to be sent at once. The **Wave component** will allow you to split up the sending, in different waves, using a fixed number of waves or a fixed number of contacts per wave.

> Use case:
>
> - A magazine wants to give away 10 free subscriptions to their readers. Every hour, an email is sent to 10% of the audience with a phone number to call. The first caller gets a free subscription for the year.

10.11 TESTING CONVERSION EFFECTIVENESS

Engage includes AB testing and Control Groups, to test how well certain messages do compared to others.

With **AB testing**, you can test up to 7 messages and define the test audience as a percentage of your total audience or as a fixed number of contacts. The contacts for each test version of the message are selected randomly and the winning version is sent automatically to the remaining contacts in the audience.

The **Control Groups** component splits the journey's audience into groups of contacts, each with its own path to follow in the journey. The different groups are created based on a fixed number or percentage and are calculated and re-calculated at each execution of the journey. Each path can be followed by a message, but it does not have to be. Define a group that did not receive any message to compare with the groups that did.

> Use case:
>
> - Target the 100 biggest spenders in your audience with a 5-star promotion while all others do not receive anything. (Control groups)
> - Invite the most senior member of the 10 most earning families to a special sponsorship event. (Control groups)

10.12 SOCIAL INTEGRATION

Social channels are covered through the journey functionality where Facebook Audience, Google Customer Match, Twitter Tailored Audience and Snapchat Segment Audience lists can be updated with Engage contact records.

> Use case:
>
> - Inform your audience of a new shop opening through a Facebook ad.

10.13 DATA STORAGE AND RETRIEVAL

There are several ways available to store or update data. The standard **Data save** component lets you update data in lists and linked lists. The **Data Lookup component** allows searching for a specific record in a linked list. The found record can then be used in the journey or for personalization in pages.

> Use case:
>
> - Capture a new contact's data from a registration form and create a record in the database.
>
> - Update the shop preferences of an existing contact record based on information stored on previous purchases.
>
> - Whenever a new purchase is registered for a contact, retrieve loyalty points for a contact and send out a corresponding voucher depending on the number of points.

An **Event Data Component** is dedicated to the Custom Events list and allows you to create new events in such a list as the result of a specific path in a journey.

> Use case:
>
> - On the annual customer day we register who is present and on what day (Saturday or Sunday) and store this information in the Custom Events List "AnnualCustomerDay". This triggers the journey where we split the audience. Two distinct emails are sent to thank them and with a link to enrol for next year. When they decide to enrol a new record is created in another Custom Events List "CustomerDay2023Enroll".

11 Data and Segmentation

11.1 DATA MODEL

Because of technical and functional reasons, Engage utilises a **star data model** – basically a de-normalized relational model and very easy to understand and query for an end user.

At the center of the star lies an Audience List containing contacts as the intended target for campaigns – everything related tracks back a specific record in that list. Data that cannot be related back to the Audience List has no added value in Engage.

It is recommended to have the least amount of Audience Lists possible – ideally one - providing a single system of truth across all campaigns. Multiple Audience Lists can be used when there is a complete segregation between records in each list. (for example when completely different products exist, such as newspapers versus magazines, that target a completely different audience.)

The type of relation you create between your main Audience List and any other linked list determines how you can use that data for personalization and selection:

- 1:1 linked data can be used directly in any type of message for personalization
- 1:N and 1:N:1 can be used for personalization in email messages in Custom Journeys only
- 1:1, 1:N and 1:N:1 linked data can be used in selections, such as the lookup.

> Use case:
> - List all orders over the last year for the current contact in a summary email (1:N data)
>
> - Select all contacts that have set France as their preferred travel destination.

11.2 LIST CREATION AND MANAGEMENT

Engage lets you create and manage your lists in an intuitive interface. **Wizards** guide you through the creation process of the list, and once it is created, you can easily configure custom fields, add data manually or import from files, create relations between lists, or configure segments for each list.

Many data types are supported such as boolean, numeric, long, float, data, datetime, text, longtext, UniqueIdentifier and JSON (only for Custom Event lists).

Lists can be **shared** with other organizations. The list is managed once but used in several organizations. Filters can be applied to only share a portion of the list with another organization.

> Use case:
>
> - A European automotive company has branches per country. One single Audience List to store all their customers, but each branch will only have access to the contacts in their country

You can configure different kinds of **relations** between the lists (1-on-1, 1-on-many...) by selecting the parent and child table, the primary and foreign key. A unique "scope" name identifies the relation. If the relation is 1-on-1, fields from the child table can be used directly in message personalization and segmentation. Journey audience selections can be made based on the parent table (the audience list), but also on the linked tables.

Every time an Audience List is used, this information is stored and users have a full view of where a specific list (journey, message, export or import) is being used.

11.3 LIST TYPES

The client's data is structured and stored in different types of lists. Each list has a corresponding table in the database, but this is not visible to the customer.

The list types determine how the data is available in Engage.

An **Audience List** holds all general contact related information. It is used in journeys to target contacts or for personalization in content.

A **Data List** can hold any contact data not directly related to the contact's profile such as user preferences, loyalty card info, purchase info, contest and survey answers...
Of course, some of this related information could also be stored on the Audience List itself. It is entirely up to the client to define the preferred business logic.

Relations can be created between Audience Lists and Data Lists and Engage offers the flexibility to configure different kinds of relations between the tables (1-on-1, 1-on-many...)

The **Devices List** stores the available devices for a contact and is always linked to an Audience List. Contacts can have more than one device and are N to 1 linked to the audience.

Other list types define not-contact-related data. A '**Data Selection'** List stores for example the items of email newsletters or abandoned basket emails. Items often consist of text, images, hyperlinks, etc. These elements are stored in the data selection list and can be used to fill out repeating content in messages.

The **Option List** stores a list of language dependent option values to choose from when the Option List is linked to a field in a list. The user can select a value in their language from the drop-down list when filling out forms, creating segments and so on.

Custom Events Lists are linked to an Audience List and store the different events for a contact. These events can then be used to trigger an event-driven journey.

11.4 EXTENDING THE CONTACT PROFILE

Engage is capable of automatically extending the contacts' profiles based on their behavior in Engage (filling out forms, viewing and clicking in emails, attending events, ...) or from data acquired from other Marigold modules like Site or Grow. This 'extended' data can be used in audience selections, personalization and segmentation.

With the **Engagement Metrics and Interest Tags** feature, the profile is extended based on click behavior and interest in Engage. Categorize the measurable hyperlinks in emails, newsletters, webpages... and Engage will automatically store how many times the contact clicked per category. It also stores the division per category in percentage and the top 5 clicked categories directly in a profile extension. This extended data also includes how many emails they received, viewed and clicked. This profile extension can be used for personalization and filtering.

11.5 LIST QUALITY

The Audience List is one of your most valuable marketing resources. It holds contact and personal information needed in journeys to target your contacts.

The feature **"email quality" automatically manages bounces** and unsubscribes (opt-out) the contact. Define when a contact should be opted-out:

- If his email address is syntactically incorrect,
- or has a non-existing domain,
- or if it bounces (hard or soft bounces) certain times.

The user can choose between different levels of quality checks, from normal, through defensive to aggresive.

Bounce management is very important and influences the sending "reputation". When emails do not bounce and have good content, the email provider allows them to send more emails, i.e. a "good" reputation. When ignoring bounces or delivering bad email content, the email provider allows to send less emails, and the sending IP address reputation is lower. IP addresses can also become "blacklisted", meaning the IP addresses cannot send to the email provider at all.
This of course affects your business directly. If half of the audience list contains Hotmail addresses and you are not allowed to send to them, the consequences can be devastating.

11.6 MANAGING LIST DATA

Data in lists can be created manually directly in the list, or automatically by importing records from a file. If you have an external source, a one-time import of the data can be done. If regular updates are required, an import task can be used.

Data can also be added or updated in these lists in a journey with a Data or Event Data component.

In addition, **personal data** can be hidden for certain users if needed. This allows for limited exposure of your data to only profiles that really need it.

The list **history** provides insights on how many records were created, updated or deleted over time.

11.7 LIST UNSUBSCRIBES

Engage has an integrated unsubscribe feature that unsubscribes the contact from any channel when clicking the default List unsubscribe link in a message. This is a smart unsubscribe, meaning that all transactional messages and messages as a result of an interaction will still be sent out.

11.8 LIST SEGMENTS

Predefined "segments" are sub-selections of the Audience List, that group several contacts together. These segments can be used and re-used in journeys to target the contacts grouped in the segment.

> Use case:
>
> - All loyalty card holders are grouped together in a dedicated segment. These can then be used in multiple reward campaigns.

E.g., "the weekly newsletter's opted-in contacts" is a segment defined once and used in each week's newsletter journey. This is a **dynamic segment**, each week the number of opted in contacts can change. A segment can also be a 'snapshot' of several contacts at a certain moment in time. This is called a **static segment**. E.g., the winners of a contest. It will always be the same contacts.

Dynamic segments are created graphically with the "filter designer". The **filter designer** provides a graphical way of creating SQL constraints, without the need for SQL scripting knowledge. Use contact profile data (age, profession,...) to define your target audience, but also historic response data, purchase transactions (if available), subscription data, etc. Engage automatically converts these interactions to actionable data. For example, send a reminder email based on whether a customer clicked or did not click the previous email. With each added filter, the remaining number of contacts is displayed according to the initial target audience.

11.9 LIST SHARING

Lists can be **shared** with other organizations. The list is managed once but used in several organizations. Filters can be applied to only share a portion of the list with another organization.

> Use case:
>
> - A European automotive company has branches per country. One single Audience List to store all their customers, but each branch will only have access to the contacts in their country

For shared Audience lists, when segments are linked, only those that are global will be shared as well. Segments stored within the organization will never be visible to the other organizations. Thanks to this, each organization can still have their own segments while at the same time benefiting from the globally available segments.
Also, for Audience Lists, any Custom Event list linked to the Audience will also be shared with the other organizations, allowing them to also use that data to drive campaigns.

12 Data Transfer and Integration

12.1 MANUAL IMPORT

Records can be manually imported into lists and static segments. Existing records can be updated or deleted, and new ones inserted. A series of settings defines what happens when there are duplicate records or records generating errors.

Different source file options are allowed (csv, txt, xls, RSS) as well as different mediums from where the files are imported: Repository, public or authorized URL, Azure Blob storage, Amazon S3, Google Cloud storage and FTPS/FTPS implicit/SFTP).

12.2 SCHEDULED TASKS (AUTOMATED IMPORTS, EXPORTS AND SQL TASKS)

Exchange between Engage and any other system at certain time intervals, including regular calculations or other logic, with Engage's built-in scheduled tasks.

By using tasks, you can easily manipulate the data in the database. Records can be imported, exported, updated and so on.

Batch tasks let you create a flow of tasks to be executed, allowing you to automate data manipulations. With SQL tasks one or more stored procedures can be executed to manipulate the data, such as perform automated calculations, create aggregates, enrich data, etc.

Notifications can be sent when tasks are completed or failed, including the processing details.

12.3 API

The Engage API provides a whole series of methods that lets you manipulate data, execute tasks, launch journeys, create messages and so on.

The Engage API explorer is accessible as a module directly from the Engage platform and provides testing of features and documentation on how to use the API explorer.

13 Supported Channels

Execute communication strategies across **all channels**. Apart from traditional online outbound channels like email, webpages, and SMS also mobile notifications and social networks can be used. Define inbound channels like incoming SMS messages and use them in your journeys. If you need an additional channel, inbound or outbound, that is not supported by default, custom plug-in "connectors" can easily be created and used in journeys.

<u>Mobile Solutions</u>

Send **SMS messages** via your own mobile provider or use Engage's third-party mobile provider to send your messages. Define an inbound interface to handle all incoming SMS messages and act accordingly in journeys. Even create a **"dialogue"** with the contact through incoming and outgoing SMS messages.

Send simple and rich mobile **push notifications**; Display in-app messages. Capture **mobile app behavior** to enrich the contact's profile and define communication strategies. All with Engage's native mobile solution. Implementing SDK in your mobile app is necessary.

Automatically enrich the contact's profile with **mobile usage information**. E.g., how much does he use his mobile device to interact with your messages and what is the division between mobile or desktop devices.

Social networks

Update your contact lists in Facebook, Twitter, Snapchat and Google and target them with ads. From a journey, Engage contacts can be added to the Facebook Audience or Google Customer Match, for instance as the result of a feedback given, a click in an email, a registration, etc.

Multi-channel journeys

Combine any channel in a multi-channel journey. For example, invite the contact by email to an event and keep him up to date with mobile messages. Or, depending on the preferences of the contacts, choose the right channel for him and send a message in an email , SMS or mobile notification, all in one journey.

14 Linking with other Marigold Modules

Engage integrates seemingly with other Marigold modules:

- **Site** - Build profiles using the visitor's behavior on the website and target them with tailored content using that profile information. Engage data can be extended with Site profile information for segmentation and targeting in Engage journeys, Engage pages can be used for offering in Site, and vice versa, Engage data can be used in Site as well for segmentation.
- **Recommendations** - Recommendations allows you to insert dynamic and intelligent modules in your Engage emails and web pages by means of Smart Content and Smart Subject Lines. Smart Audiences are created using algorithms and can then be used for segmentation in Engage.
- **Data Studio** - Dashboards are created using Engage profile data, Engagement metrics, interaction data, journey related data, etc, providing detailed reports on journeys, content and contacts.
- **Grow** - Grow enables you to create interactive and engaging ways to acquire zero-party data which can be used to create new profiles or enrich existing profiles in Engage.

15 Linking to External Systems

Engage has built-in features to link with several external systems. Apart from sending mobile notifications and SMS messages and linking to social networks (Facebook Audience, Twitter Tailored Audience , Snapchat Audience segment and Google Customer Match), Engage also links to **Salesforce and Microsoft Dynamics, Sugar CRM** (and of course Marigold's own CRM system "CDM" natively) through the **"CRM connector"**:

- Data transfer between Engage and the CRM system is set up automatically to synchronize contacts, leads or any other CRM data from and to Engage.
- Synchronize Salesforce "Campaigns" and Microsoft Dynamics "Marketing lists" to Engage. They will appear as segments on the Audience List to be used as target audiences in journeys
- Synchronize SugarCRM Campaigns to Engage and synchronize data with Engage Audience Lists and linked lists.
- With the "CRM connector component" create new instances of objects in the CRM system within a Engage journey. E.g., new lead, new opportunity, new case, new appointment...
- Show Engage contact and overview reports in the CRM system

- Integrate and use journeys in the CRM system

Engage also connects to the ecommerce platform **Shopify and Adobe Commerce**:

- Synchronize Shopify/AdobeCommerce contacts, products and orders data from and to Engage.
- Send "abandon basket" emails when a contact abandons his basket within the Shopify/AdobeCommerce platform.
- Store Shopify/AdobeCommerce contact info in Engage to use in selections, segmentation and personalization: order values, product values, discount values, gift info, visits and many more.

Any other integration, inbound or outbound, between client specific third-party platform and Engage is possible through a **custom plug-in-based connector**. A plug-in handles the communication between the third-party and Engage. The connector itself is used in Engage journeys, as an inbound or outbound channel.

16 Reporting

Engage reports give insight on how your messages and journeys are doing. Reports can be consulted from individual items, via dashboards or the dedicated Report section.

16.1 MESSAGES

Email delivery reports include global delivery rates, bounces, open rates, CTO, revenue generated and so on. You can also view non-delivery reports which include the causes of non-delivery and a chart that shows the targeted domains. A domain delivery report is also provided – this includes information on volumes, drop time and delivery rate. Furthermore, email clients used to view the email are listed.
Live email view provides users with live data on the progress of their email and delivery rates. The functionality only includes numbers for emails and pages in journeys. The numbers are refreshed every 20 seconds

SMS delivery and bounce detail reports are provided.

Mobile message reports include the delivery details as well as an overview of the devices used to view the notifications. Interaction with the notification is reported as well.

16.2 JOURNEYS

A general dashboard provides an overview of the different journey types.

- Status reports are available for Custom Journeys, including delivery details for the different channels in the journey.
- Transactional Journey reports include activity reports and delivery details.
- AB Journey reports include delivery comparison reports for the different versions, email clients used, activity details and more
- Single Batch Journey reports also provide insight on the delivery details and email clients used to view the message.
- Recurring Batch Journeys provide delivery and activity details per run as well as accumulated data.

16.3 DASHBOARDS

A default set of dashboards is provided that allow to filter and compare journeys. These dashboards use the Cumul.io technology. Channel performance dashboards provide multi-channel performance metrics for all journeys over time or for selected journeys only.
Comparison dashboards allow comparing multiple journeys over 2 time periods.

Filters can be applied to narrow down the results. All widgets on the dashboard will automatically apply the filter.

Dashboards and reports can be downloaded as an image or csv file. A full export of a complete dashboard is possible as well.

17 System Management

17.1 MULTIPLE ORGANIZATIONS MANAGEMENT

Everything in Engage is managed with the organization in mind. Organizations are entities that may reflect a brand, department, or any other type of division within your company. With organizations, customers can separate contact data and interaction data for different organizations and give users rights only to assets linked to their organization. However, it is still possible to use one single audience and share all data across organizations. The Engage organization feature allows both.

More, organizations can support different languages, different mail domains, use different integrations with SMS channels, or social channels. Distinct trackers can be set up per organization and CRM integration can be specific for each organization as well.

This allows you to have an individual approach to each organization and at the same time share elements whenever possible.

> Use case:
>
> - A global organization with branches in multiple European countries.
> - A Retail company with multiple sub-brands.

17.2 USER MANAGEMENT, USER GROUPS AND ACCESS RIGHTS

Setting rights for users is managed easily through user groups and permission sets.
Every permission set has a specific set of rights. Different permission sets can have overlapping rights or be complementary. Imagine creating a permission set for administrators, marketers, content approvers, supervisors.
Users are added to user groups and can be added to multiple groups at a time.
Permission sets are assigned to user groups and when something changes for a permission set it changes for all users in the group at once.

Access rights are granted for

- The different modules such as Admin configuration, Campaign, Recommendations
- Functionality such as Live Content, the Library, tasks, Content Blocks, Custom Components
- Channels such as Email, Pages, SMS, Mobile

- Content and journeys such as transactional messages, templates, lists
- ...

17.3 FOLDER RIGHTS

Assets, such as content, lists and journeys are stored in folders and subfolders. This allows marketers to organize their assets in a structured way and make them easily available for others to use.

Groups of users can be attributed access rights to folders, restricting who can see what. These folder rights have an impact on multiple levels in the Engage application:

- Users cannot create or use assets in folders they don't have access to.
- When trying to access journeys or content that are using assets in folders with no access, the user will not be able to open the journey or content
- Reports are only available for assets in folders the user has access to.

17.4 TRACKERS

Engage automatically tracks online interactions on Engage emails and pages and stores this data in the database to make it available through reports and dashboards.

However, when you want to track behavior on an external website, you can use the web tracker that is supported by Engage or use an external tracker such as Google analytics, Adobe analytics and Lotame.

Set up and activate trackers on specific domains to analyze known and unknown contact's behavior using various online environments, whether it is your own organizational website, an online product catalog or social media interfaces.
When working with multiple organizations you can decide to use the tracker for one organization or all.

17.5 COLLABORATION

Notify specific users or groups of users when certain actions have been performed, succeeded, generated errors or failed. These notifications are available for more technical aspects such as data exports, tasks, and CRM data synchronizations, but also in Custom Journeys when wanting to send out a confirmation email to an Engage user or group when an email is sent out in the Custom Journey.

17.6 MAIL DOMAINS

Mail domains are handled on a global level, but one mail domain can be used by different organizations, and an organization can have several mail domains assigned to it. With mail domains you can set from and reply addresses as well as aliases and link these to specific languages. This setup lets you send messages in different languages, using different mail domains and thus from and reply addresses. You can also choose to use the same mail domain for all your communication.