Unica Journey
V12.1 User's Guide

Contents

Chapter 1. An Introduction to Unica Journey

Unica Journey is a goal-based orchestration solution to craft, execute, and visualize context-driven, personalized, multi-step omnichannel customer experiences.

Marketers can use Unica Journey to:

- Define goals for customer experience
- Easily adjust journeys in real time to achieve them
- Craft and visualize entire customer Journey across channels/touchpoints and events with a sleek and intuitive Journey Canvas

Customer journeys are completely automated and synchronized with every step of your customer's brand engagement. Use the real-time Insights within Journey to understand customer behavior with insights that reflect things as they happen in their Journey.

Features of Unica Journey

The features of Unica Journey are as follows:

- **Goal driven Experiences**: Define goals for your customer experience and easily adjust your journeys in real time to achieve them.
- **Orchestration Canvas**: Craft and visualize your entire customer Journey across channels/touchpoints and events with a sleek and intuitive Journey Canvas.
- **Always on Engagement**: Completely automated execution that is in sync with every step of your customer's brand engagement.
- **Real-time Insights**: Understand your customer behavior with insights that reflect things as they happen in their journeys.
- **Choice of Touchpoints**: Leverage the out of the box native touchpoints for digital channels or craft a custom touchpoint and seamlessly orchestrate the journey across your eco system.

- **Dynamic Data Framework**: Flexible data definition and entry sources to augment customer journey with contextual data and events from multiple touchpoints and in variety of formats (File, API, etc.)

Benefits of Unica Journey

The benefits of Unica Journey are as follows:

- **Increased Brand Loyalty**: Strengthen your brand following with targeted and automated journeys that acquire, nurture, convert and retain customers.
- **Amplified Omni Channel Engagement**: Deliver a consistent customer experience across channels with native integration for outbound (Unica Campaign) and inbound engagement (Unica Interact, Unica Deliver, and Unica Discover).
- **Shorten your Customer Conversion Cycle**: Be a step ahead and drive your customer to their goals with timely next best actions.
- **React to the Moment**: You will not miss any opportunity to know where your customer is on their journey and delight them with relevant experience.
- **Lower Marketing TCO**: Reduce your marketing TCO with automated flows and plug and play integration to your MarTech ecosystem through an open and flexible framework powered by the Unica Link.

Chapter 2. Getting started with Unica Journey

The following sections will explain the basic flow of events in designing Journeys.

Define the entry source of data coming in to the Journey

The first step is to in designing a Journey is defining and creating an entry source for Journey. Unica Journey can receive input data from variety of entry sources. These sources input data into the Journey application. The following entry sources are available in Journey to support input of audience data into Journey:

- **File based entry source** - Supported file types are `CSV`, `TSV`, and `JSON`. You can create this type of entry source if you need to get the static data input in Journey.
- **REST entry source** - This type of entry source supports input of data, at runtime, in Journey. You can use the REST endpoint to input data into Journey from external systems.
- **Kafka entry source** - This type of entry source supports input of data, at runtime, in Journey. You can input data from the external systems to Journey using the Kafka entry source. Unica Campaign and Unica Interact also uses the Kafka to send audience data to Unica Journey. Journey provides a dedicated Kafka topic for this data input.
- **Unica Campaign** - This type of entry source supports input of data, at runtime, in Journey. You can input data from Unica Campaign to Journey using Unica Campaign entry source.
    - When Unica Campaign entry source is selected, detail of all the Campaign flowcharts sending data to the selected Campaign entry source is displayed. Information includes Campaign Name, Campaign ID, Flowchart Name, Flowchart ID and Last Run Date Time.
- **Unica Interact** - This type of entry source does not require any input for creating entry source. Once the entry source is created, the unique code is used to send data from Interact to Journey.

- **Unica Discover** - This type of entry source does not require any input for creating entry source. Once the entry source is created, the unique code is used to send data from Discover to Journey.

  Note: The option of Unica Interact and Unica Discover are available from V12.1 Fixpack3.

Define the format of data coming in to the Journey

Unica Journey accepts data from variety of sources. Since it accepts data from variety of sources, it should know the format of the data coming in to the entry sources. You should create a Data Definition in Unica Journey to define the format of the data. When creating Data Definitions, specify the Field Names, Data Type, Date format (for date type field) and length of the input field. Journey uses this to identify the format of the data coming in.

Create a Journey with Data Definition and Entry Source

You can create a Journey with multiple Entry Sources. Journey gives you the flexibility to use multiple sources for inputs like Files, Kafka, Unica Campaign, Unica Interact, Unica Discover, REST etc. You can add an Entry Source or delete an Entry Source during creation of a Journey or modification of a Journey. Additionally, you must assign a Data definition to the Journey. Data Definition helps Journey identify the format of the data coming into the Journey. You can add only one Data Definition in the Journey. Once the data definition is assigned, and the Journey is published, you cannot change the Data Definition. You can only change the Data Definition when you are in the draft state, but it can delete the configuration Touchpoints in the Journey.

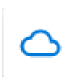
Design a Journey

You can design a Journey using the Journey controls and the Touchpoints that are available in the Palette. The Palette is divided in two categories:

- **Touchpoints** - allows to integrate with delivery channels.
- **Controls** - helps user to design Journey execution logic.

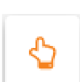
Journey Touchpoints

The following table lists the Touchpoints and a brief description about it:

Icon	Touchpoint	Description
	Email	Sends email communication using Unica Deliver or Unica Link
	SMS	Sends SMS communication using Unica Link
	Salesforce	Performs CRM operations like add or update of contacts and leads using Unica Link.
	Whatsapp	Sends whatsapp messages using Unica Deliver

Journey Controls

The following table lists the Journey control and a brief description about it:

Icon	Journey control name	Description
	Decision	Allows Journey designer to split the Journey flow based on configured conditions on the audience data.
	Engagement	Allows Journey designer to split the Journey flow based on the audience response to any Touchpoint actions
	Join	Allows Journey designer to join the data flow from two branches.

Icon	**Journey control name**	**Description**
	Delay	Allows Journey designer to introduce a delay in execution for the Journey audience in a defined stage.
	Publish	Allows a designed Journey to output the Journey data to a flat file, a Kafka topic, or Entry Sources of type Kafka
	Database	Enable orchestration with other system by inserting/updating database row or updating a raw sequel. This will be executed for every record in the Journey.

Chapter 3. Entry Sources

Entry source is the source from which you are providing data for the Journey. A Journey can have one or multiple entry sources.

Creating Entry sources

To create Entry Sources, complete the following steps.

1. In the Entry Sources menu, click **+ Entry source**.
   The **Create entry source** page appears.
2. Provide appropriate values for the following fields.
   - **Name**- Mandatory
   - **Description**- Optional
3. If you want to save the Entry Source in a location different than the root (/) folder, click **Browse** and select the required folder.
4. In the **Import data from** section, select from one of the following options:

   Note:
   - Use **CSV**, **TSV**, and **JSON** when you have a static data of customers. Use **REST API**, **Kafka**, **Unica Campaign**, **Unica Interact** and **Unica Discover**for transactional mode.
   - In case of **CSV**, **TSV**, and **JSON**, you can add multiple files. If Journey encounters duplicate data, it will either update the data or discard the data based on the settings made in Journey Settings or Deduplication *(on page 48)*. Even if you have not configured Deduplication settings, Journey accepts the new data and processes the newly added files.

   - **CSV** - If you select this option, upload the appropriate `CSV` data file.
   - **TSV** - If you select this option, upload the appropriate `TSV` data file.
   - **JSON** - If you select this option, upload the appropriate `JSON` data file.

- **REST API** - If you select this option, you will receive a static URL to which you can push the data dynamically.
    a. Generate REST API keys. For more information, see Creating a new REST integration *(on page 73)*.
    b. Generate the authentication token using the URL `http://<localhost>:<port-number>/journey/api/thirdpartylogin`.
    c. To authenticate this URL, use the REST API keys, generated in step (a).
    d. To send the data to Journey use Rest API mentioned above use the authentication token and `entrySourceCode` while sending the data.
    e. `entrySourceCode` is mandatory to send data on REST Entry Source.
- **Kafka** - If you select this option, you will see a dedicated Kafka topic name on which you can post your data.
- **Unica Campaign** - If you select this option, then you can send data from Unica Campaign to Journey. The token validity of platform should be increased manually to 10800 seconds (3 hours) because the default token validity of platform is 15 seconds. Due to this an error message is displayed on the campaign entry source screen that Campaign login failed OR session expired. Try Relogin into application.

Path

Platform -> Settings -> Configuration -> General -> Miscellaneous -> Token lifetime

Note: After increasing the validity restart the Campaign application.

- **Note:** The option of Unica Campaign is available from V12.1 Fixpack 2. The earlier versions of Journey used Kafka entry source for sending data from Campaign to Journey.
- **Unica Interact** - If you select this option, then you can send data from Unica Interact to Journey.
- **Unica Discover** - If you select this option, then you can send data from Unica Discover to Journey.

5. Click **Create entry source**.

Operations on Entry sources listing page

The Entry Sources listing page lists all the entry sources that you have created. You can customize the view or make modifications to the listed entry sources.

You can perform the following operations on the Entry Sources listing page.

- Adding or Removing the listed Columns in Entry Sources *(on page 9)*
- Modifying an Entry Source *(on page 10)*
- Moving Entry Sources to another Folder *(on page 11)*
- Deleting Entry Sources *(on page 11)*

Adding or removing the listed columns in Entry sources

The Entry Source listing page lists the Entry Sources for the specified folder. The default columns can be customized as per requirement.

Default fields appear by default and you cannot remove default fields from the view.

The following table lists all the available column fields.

Table 1. Available Column Fields in Entry Sources Listing

Field Name	Default Field?
Code	Yes
Created By	No
Created On	No
Description	No
Entry Source Name	Yes
Last Modified By	No

Field Name	Default Field?
Last Modified On	Yes
Source	Yes
Status	Yes

To customize the Entry Source listing view, complete the following steps:

1. Select **Add/Remove Column**.
2. Select or Deselect the fields that you want to add or remove. Click **Reset Default** if you want to view default fields.
3. Click **Apply** to save the selection.

Modifying an Entry source

You can make modifications to Entry Sources that you have created. The modifications are dependent on the status of an Entry Source. An Entry Source status is `In Use`, if it is associated with a Journey of any state (Draft, Completed, Paused, or Published). An Entry Source status is `Idle` if it is not associated with a Journey. If an Entry Source status is `Idle`, you can modify all fields. If an Entry Source status is `In Use`, you can modify the Name, Description, and Folder fields, and also add files to the Entry Source.

You cannot modify the value of the **Import data from** field. For example, you cannot change the entry source type from CSV to TSV, or other options.

You can modify the Name, Description, and Folder during modification of an entry source.

To modify an entry source, complete the following steps:

1. Hover the cursor over the required Entry Source.
2. Select **>**  . Alternatively, click the Entry Source Name.
3. Make the required modifications. For more information, see Creating Entry sources *(on page 7)*.

4. To save the modifications, click **Update entry source**.

Moving Entry sources to another folder

You can move a single Entry Source or multiple Entry Sources from one folder to another.

To move an entry source, or multiple entry sources, complete the following steps.

1. Use one of the following methods:
    a. To move a single entry source, you can either hover the cursor over the required entry source and select **>** , or select the checkbox preceding the required entry source and click **Move to folder**.
    b. To move multiple entry sources, select the checkbox preceding the required entry sources and click **Move to folder**.
2. Select the required destination folder and click **Move here**.

Deleting Entry sources

To delete an entry source, you have to access the Entry Source listing page. You can only delete Entry Sources whose Status is `Idle`.

You cannot delete an entry source which is in use by a Journey or multiple Journeys.

To delete an entry source, or multiple entry sources, complete the following steps.

Use one of the following methods.

a. To delete an entry source, you can either hover the cursor over the required entry source and select **>** , or select the checkbox preceding the required entry source and click **Delete**.
b. To delete multiple entry sources, select the checkbox preceding the required entry sources and click **Delete**.

Chapter 4. Data Definitions

Data definitions are the schema of your data.

Data Handling

Data handling processes valid data or invalid data and either accepts it or reject it.

Significant/Email - Email format should be correct. Any invalid email format will be rejected. This field cannot be blank or NULL when being passed from entry source

Significant/Number - Only numeric values allowed. Non-numeric values, and NULL values or blank values are rejected.

Required fields - When a significant field or a non-significant field is marked as Required, its value cannot be NULL or blank in the Entry Source. The character limit specified would be the maximum limit of the field. Any value exceeding the mentioned length will be rejected.

These required field validations are an addition to the significant field validations, in case a field is marked both Required and Significant

Creating Data definitions

To create Data Definitions, complete the following steps.

1. In the Data Definitions menu, click **+ Data definition**.
   The **Create data definition** page appears.
2. Provide appropriate values for the following fields
   - **Name**
   - **Description**
3. If you want to save the Data Definition in a location different than the root (/) folder, click **Browse** and select the required folder.

4. For the Field details section, add field details for contacting the customer in an automated manner. Each field detail contains the following combination of values.
    - **Field name**- Should match your data.
    - **Significant field**- The field Journey uses to communicate with the user.
    - **Data type**- The data type of the field. For example, String, Numeric, or Date. If you select the Date datatype, a new field appears. Type a date format and suggestions will appear in the dropdown box. Only the values selected from the dropdown box are valid values. If you enter any invalid format, data definition gets created but it results in a processing error.
    - **Required**- Indicates if a field is mandatory to be passed in to the Entry Source. For more information, see Data Definitions *(on page 12)*.
    - **Character limit**- Maximum number of characters allowed in the value when a field is marked as **Required**.

    Create single or multiple field details. To add more field details, click **+ Field**. To remove existing field details, click the icon.
5. Click **Create data definition**.

Operations on Data definitions listing page

The Data Definitions listing page lists all the data definitions that you have created. You can customize the view or make modifications to the listed data definitions.

You can perform the following operations on the Data Definitions listing page.

- Adding or removing the listed columns in Data definitions *(on page 14)*
- Modifying a Data Definition *(on page 14)*
- Moving Data Definitions to another Folder *(on page 15)*
- Deleting Data Definitions *(on page 16)*

Adding or removing the listed columns in Data definitions

The Data Definitions listing page lists the Data Definitions for the specified folder. The default columns can be customized as per requirement.

The following table lists all the available column fields.

Table 2. Available column fields in Data Definitions listing

Field Name	Default Field?
Code	Yes
Created By	No
Created On	No
Definition Name	Yes
Description	No
Journeys Associated	No
Last Modified By	No
Last Modified On	Yes
Status	Yes

To customize the Data Definitions listing view, complete the following steps:

1. Select **Add/Remove Column**.
2. Select or Deselect the fields that you want to add or remove. Click **Reset Default** if you want to view default fields.
3. Click **Apply** to save the selection.

Modifying a Data definition

You can make modifications to Data Definitions that you have created.

A Data Definition status is `In Use` if it is associated with a Journey of any state (Draft, Completed, Paused, or Published). A Data Definition status is `Idle` if it is not associated with a Journey. The modification rules for Data Definitions whose status is `In Use` are as follows:

Journey State	Edit (N/D/F)	Change Significant Fields	Add Significant Field	Add New Data Field	Alter Existing Data Field	Remove Existing Data Field	Change Association with Journey
Draft	YES	YES	YES	YES	YES	YES	YES
Published	YES	NO	NO	NO	NO	NO	NO
Paused	YES	NO	NO	YES	NO	NO	NO
Completed	YES	NO	NO	NO	NO	NO	NO

To modify a data definition, complete the following steps.

1. Hover the cursor over the required Data Definition.
2. Select the > icon. Alternatively, click the Definition Name.
3. Make the required modifications. For more information, see Creating Data definitions *(on page 12)*.
4. To save the modifications, click **Update data definition**.

Moving Data definitions to another folder

You can move a single Data Definition or multiple Data Definitions from one folder to another.

To move a data definition, or multiple data definitions, complete the following steps.

1. Use one of the following methods:

   a. To move a single data definition, you can either hover the cursor over the required data definition and select > , or select the checkbox preceding the required data definition and click **Move to folder**.
   b. To move multiple data definitions, select the checkbox preceding the required data definitions and click **Move to folder**.
2. Select the required destination folder and click **Move here**.

Deleting Data definitions

To delete a data definition, you have to access the Data Definition listing page. You can only delete Data Definitions whose Status is `Idle`.

You cannot delete a data definition whose status is **In Use**.

To delete a data definition, or multiple data definitions, complete the following steps:

Use one of the following methods.

a. To delete a data definition, you can either hover the cursor over the required data definition and select > , or select the checkbox preceding the required data definition and click **Delete**.
b. To delete multiple data definitions, select the checkbox preceding the required data definitions and click **Delete**.

Chapter 5. Journeys

Unica Journey is a goal-based orchestration solution to craft, execute, and visualize context-driven, personalized, multi-step omnichannel customer experiences.

Marketers can use Unica Journey to:

- define goals for customer experience
- easily adjust Journeys in real time to achieve them
- craft and visualize entire customer Journey across channels/touchpoints and events with a sleek and intuitive Journey Canvas

Customer journeys are completely automated and synchronized with every step of your customer's brand engagement. Use the real-time Insights within Journey to understand customer behavior with insights that reflect things as they happen in their Journey.

Integration with Unica Link allows Journey to integrate with third-party vendors. Unica Journey also has a flexible data definition and entry sources to augment customer journey with contextual data, and events from multiple touchpoints and in variety of formats (File, API, etc.)

Designing and executing a Journey involves the following procedure:

1. Create Journey *(on page 18)* - Create a Journey by selecting required Entry Sources and specifying the Data Definition to be used in Journey.
2. Design Journey *(on page 20)* - User Journey controls and touch points to design the Journey.
3. Define Journey Goals *(on page 49)* - Define Journey goals, which helps in evaluating marketing goals and completing the Journey.
4. Define Journey Settings *(on page 48)* - Define Journey settings for handling duplicate data entering the Journey.
5. Publish Journey *(on page 39)* - Publish Journey starts the execution of Journey. By default, Journey execution never stops. The execution is always ON. You can define

Journey goals to complete the Journey automatically, or manually mark the Journey as complete.

6. Pause a Journey *(on page 40)* - You can pause a published Journey and edit it.
7. Edit a Journey *(on page 37)* - You can edit the paused Journey and re-publish it.
8. Mark Journey as Complete *(on page 41)* - You can mark the Journey complete to stop the Journey execution.

Creating Journeys

To create Journeys, complete the following steps.

1. In the Journeys menu, click **+ Journey**.
   The **Create new journey** page appears.
2. Provide appropriate values for the following fields.
   - **Name** - Mandatory field.
   - **Description** - Optional field
3. Click **Browse** and select the required **Folder** in which you want to save the Journey. If you want to save the Journey in a new folder, create a folder. For more information, see Creating a folder *(on page 80)*.
4. Select the required **Timezone**.
   You can create Journeys for a different time zone and have them executed on that time zone. For example, you can be a user in India and schedule a Journey, for US PST customers, to execute on Dec 25th 00:00.
5. Select an appropriate **Marketing Stage**. The available values are:
   - **Referral**
   - **Retention**
   - **Conversion**
   - **Activation**
   - **Acquisition**

- **Awareness**

6. To add milestone to a Journey, select the checkbox I want to add milestones. After checking the checkbox, on canvas page configure deduplication settings for update contact by selecting dont allow duplicate contacts and radio button Update existing contact. To save the settings, click **Save & Close**. Journey designed with milestones will not get published without configuring this deduplication setting.

   Note: From V12.1 Fixpack3 onwards we can add milestones while creating Journey.

7. To select an Entry Source, click **Browse**.

   You can select up to 10 Entry Sources. For more information on Entry Sources, see Entry Sources (on page 7).

   To create an Entry Source, see Creating Entry sources (on page 7).

   Note: If the checkbox I want to add milestones is checked, then section select entry sources is not available. Select entry source option will be available in the next page.

8. To select a Data Definition, click **Browse**.

   You can add only one Data Definition to a Journey. For more information on Data Definitions, see Data Definitions (on page 12).

   To create a Data Definition, see Creating Data definitions (on page 12).

9. To add milestones, enter milestone name click **Add**

   You can add maximum 7 milestones to a Journey.

10. Click **Next**
   Milestone Details page appears.

   Note: Option Next is available only when milestones are added to a Journey.

11. On Milestone Details page, you can add entry source to the added milestone. To select an entry source, click **Browse**

You can add maximum 10 entry sources to a milestone. Milestone condition can be configured on data definition fields associated with journey. Based on the datatype of the field, the operators will be displayed.

12. Click **Save & Proceed**.
The Journey creation is successful and the **Canvas** page appears.

Design the Journey behavior using the Canvas feature. For more information, see Designing the canvas *(on page 20)*.

Designing the canvas

Design the behavior of a Journey by adding goals, touchpoints, and controls.

By default, a Journey has a start point and an end point. To design a canvas, complete the following steps:

1. Configure a Touchpoint. For more information, see Touchpoints *(on page 20)*.
2. Configure a Journey control. For more information, see Journey controls *(on page 29)*.
3. Configure a Journey goal. For more information, see Journey Goals *(on page 49)*.

Touchpoints

Use Touchpoints to establish a mode of communication with the customers.

In a Journey, you should setup how you would like to communicate with the customer. You can choose to communicate via Email or SMS. The touchpoint will be deactivated if the significant field for the specific touchpoint is not configured in Data Definitions. For example, if you want to use the Email touch point, and the data definition that you have added has First Name, Last Name, and Mobile Number fields, with Mobile Number as the significant field, the Email touchpoint will be disabled but the SMS touchpoint will be enabled.

For more information, see Creating Data definitions (on page 12).

To add touchpoints, complete the following steps:

1. From the Palette, drag a touch point and place it between the Journey start point and the end point.
   The available touchpoints are:
   - **Email**
   - **SMS**
   - **Salesforce**
   - **Whatsapp**
   - **Facebook**
   - **LinkedIN**

   Note: V12.1 Fixpack3 onwards AdTech touchpoint supports Facebook and LinkedIN connectors.

   Audience status - can be **Building**, **Updating**, **Ready** , **Archived** etc.

   Note: V12.1 Fixpack4 onwards Journey will support Whatsapp touchpoint.

2. Double-click the added touch point to configure it.

   a. Enter an appropriate **Name**. Adding a name is mandatory.

   b. Enter an appropriate **Description**. Adding a description is optional.

   c. Select from one of the following options:
      - **Deliver**-
      - **Link**- Connects to the default connection configured in the Settings menu. For more information, see Setting a default email connection *(on page 65)*.

   d. Click **Next**.

   e. To create a Journey with Email touchpoint, see Configuring an Email Touchpoint *(on page 22)*.

f. To create a Journey with SMS touchpoint, see Configuring an SMS Touchpoint *(on page 25)*.

g. To create a Journey with Salesforce touchpoint, see Configuring a Salesforce Touchpoint *(on page 27)*.

h. To create a Journey with Whatsapp touchpoint, see Configuring a Whatsapp Touchpoint *(on page 28)*

Delete Touchpoints

- When you delete a configured touchpoint from journey, the associated Link action id is also deleted.
- If you have multiple configured touchpoints in one journey and you delete the journey all the associated Link action ids are deleted.
- If you delete a configured touchpoint without saving the journey, then the associated Link action ids are not deleted.

Note: From V12.1 Fixpack3 onwards we can delete touchpoints.

Understand how to use Journey controls. For more information, see Journey controls *(on page 29)*.

Configuring an Email Touchpoint

Select an email touchpoint when you want to connect to the customer using email communication. If you have integrated both Unica Link and Deliver, you will see the options **Deliver** and **Link** as delivery options for the email Touchpoint.

Before you start this procedure, see Touchpoints *(on page 20)*.

To configure an email touchpoint, execute any one of the following steps:

1. Select **Deliver** and complete the following steps to configure Deliver for sending emails: If you select Unica Deliver, you are connected to the Unica Deliver execution engine for sending emails.

a. Ensure that the following prerequisites are met:
    - Create Unica Deliver Email Template in Unica Deliver.
    - Create Email templates for each email touch point that you configure using Unica Deliver. For more information on creating templates for Unica Deliver, see *Unica Deliver User Guide*.

b. In the **Email Configuration** dialog, select **Deliver** and click **Next**.
The **Select Template** dialog appears.

c. Select the required template. If there are multiple templates, use the Search bar to locate the required template. Click **Next**.

Note: In Unica Deliver, once a template is selected for configuring email Touchpoint, it will no longer be available for configuring other email Touchpoints.

The **Mapping** dialog appears.

d. Map the Deliver fields with the appropriate Journey fields (coming from the Data Definition associated with the Journey during Journey creation). This is essential as the mapping changes the value on runtime.
The mapping achieves personalization to the email. In Deliver, if you map `FirstName` of Deliver to `fname` of Journey and the `LastName` to `lname`, the salutation in the email will be personalized to the value of the field.

e. Click **Save**.

2. Select **Link**.
If you have set a default email connection in Setting a default email connection *(on page 65)*, and if the default connection set is **Mailchimp**, move to Step (4). If the default connection set is **Mandrill**, move to Step (5). If you have not set a default email connection, the **Existing Connections** dialog opens.

3. Select either **Mailchimp** or **Mandrill** and click **Next**.
The **Create New Action** dialog appears. In this dialog, you can also switch to a different connector by selecting **Existing Connection**.

4. If the default connection is **Mailchimp**, complete the following steps:

    a. Provide values for the following fields:
        - **Contact Action** - Mandatory. The action to be performed on the contacts.
        - **Audience** - Mandatory. The list in which you want the audiences to be saved.
        - **New Email Campaign** - Mandatory. The name of the new email campaign.
        - **Email Template** - Mandatory. The template used for the email.
        - **Email Subject** - Mandatory. The subject of the email to be sent to the users.
        - **Preview Text** - Optional. The text that will be part of the body of the email.
        - **Sender's Name** - Mandatory. The sender who sent the email to the customer.
        - **Reply to Email** - Mandatory. The email address which will be used for a customer to reply back..
        - **Group Contacts By Tag** - Optional.
        - **Fetch Results End Date** - Optional.

    b. Click **Next**.
    The **Field Mapping** dialog appears.

    c. Map the email connector fields with the appropriate Journey fields (coming from the Data Definition associated with the Journey during Journey creation). This is essential as the mapping changes the value on runtime.
    The mapping achieves personalization to the email. In mailchimp, if you map `first_name` of mailchimp to `fname` of Journey and the `last_name` to `lname`, the salutation in the email will be personalized to the value of the field.

    d. Click **Save**.

5. If the default connection is **Mandrill**, complete the following steps:

    a. Provide values for the following fields:
        - **Email Template** - Mandatory. Click **Fetch** to view the available templates.
        - **Sender Email** - Optional. The email address of the user sending the communication.
        - **Email Subject** - Optional. The subject of the email to be sent to the users.

- **Reply to Email** - Optional. The email address which will be used for a customer to reply back.
- **Fetch Results End Date** - Optional. Configure a date for accepting customer responses.

  Note: When configuring Mandrill, if you do not provide values for the optional fields, Mandrill fetches the value from the selected Mandrill template. Ensure that you provide all the values during template creation in Mandrill.

b. Click **Next**.
   The **Field Mapping** dialog appears.

c. Map the email connector fields with the appropriate Journey fields (coming from the Data Definition associated with the Journey during Journey creation). This is essential as the mapping changes the value on runtime.
   The mapping achieves personalization to the email. In Mandrill, if you map `FIRSTNAME` of Mandrill to `First_Name` of Journey and the `LASTNAME` to `Last_Name`, the salutation in the email will be personalized to the value of the field.

   Note: Mandrill supports up to five personalization fields in the **Field Mapping** dialog.

d. Click **Save**.

Configuring an SMS Touchpoint

Select an SMS touchpoint when you want to connect to the customer using mobile messages. If you have integrated both Unica Link and Deliver, you will see the options **Deliver** and **Link** as delivery options for the SMS Touchpoint.

Before you start this procedure, see Touchpoints *(on page 20)*.

To configure an SMS touchpoint, complete the following steps:

Note: Currently, Unica supports LINK (Twilio) and Deliver for SMS connections.

1. Select **Link**.

   Set the default connection for SMS. For more information, see Setting a default SMS connection (on page 65).

   The **Create New Action** page appears.

   a. Provide values for the following fields:
      - **Message** - Mandatory. This is a free text textbox, where you can add the personalization fields. For example, `Hi <First Name> Welcome to Journey`. Here `<First Name>` is the personalized field, which you can map with Journey fields in the next step. You can add up to five personalization fields in one SMS.

   b. Click **Next**
      - The **Field Mapping** dialog appears.

   c. Map the SMS connector fields with the appropriate Journey fields (coming from the Data Definition associated with the Journey during Journey creation). This is essential as the mapping changes the value on runtime.

   d. Click **Save**.

2. Select **Deliver** and complete the following steps to configure Deliver for sending SMS: If you select Unica Deliver, you are connected to the Unica Deliver execution engine for sending SMS.

   a. Ensure that the following prerequisites are met:
      - Create Unica Deliver SMS Template in Unica Deliver.
      - Create SMS templates for each SMS touchpoint that you configure using Unica Deliver. For more information on creating templates for Unica Deliver, see *Unica Deliver User Guide*.

   b. In the **SMS Configuration** dialog, select **Deliver** and click **Next**.
      The **Select Template** dialog appears.

   c. Select the required template. If there are multiple templates, use the Search bar to locate the required template. Click **Next**.

Note: In Unica Deliver, once a template is selected for configuring SMS Touchpoint, it will no longer be available for configuring other SMS Touchpoints. This condition applies only if you Publish the Journey immediately after configuration. If you do not Publish the Journey, and during that time if another user wants to use the same template, it will be available for the other user to configure the SMS Touchpoint. If the other user publishes the Journey, you must reconfigure using another template.

The **Mapping** dialog appears.

d. Map the Deliver fields with the appropriate Journey fields (coming from the Data Definition associated with the Journey during Journey creation). This is essential as the mapping changes the value on runtime.
The mapping achieves personalization to the SMS. In Deliver, if you map `FirstName` of Deliver to `fname` of Journey and the `LastName` to `lname`, the salutation in the SMS will be personalized to the value of the field.

e. Click **Save**.

Configuring a Salesforce Touchpoint

Select a Salesforce touchpoint when you want to connect with customers on Salesforce. When configuring Salesforce touchpoint, the connector to be used will be the Salesforce connector.

Before you start this procedure, see Touchpoints *(on page 20)*.

To configure a Salesforce touchpoint, complete the following steps:

1. Set Salesforce connector as the default Salesforce connector in Setting a default CRM connection *(on page 66)*.
The **Create New Action** page appears.

2. Provide values for the following fields:
    - **Object Action** - Mandatory. Specify if you want to create a new Object or update an existing Object.
    - **Object Type** - Mandatory. Specify if you want to create a new Lead or a Contact.
3. Click **Next**.
   The **Field Mapping** dialog appears.
4. Map the Salesforce fields with the appropriate Journey fields (coming from the Data Definition associated with the Journey during Journey creation). This is essential as the mapping changes the value on runtime.
5. Click **Save**.

Configuring a Whatsapp Touchpoint

Select Whatsapp touchpoint when you want to connect to the customer through whatsapp messages. Whatsapp is integrated with Unica Deliver, so you get connected to the Unica Deliver execution engine for sending whatsapp messages.

Before you start this procedure, see Touchpoints *(on page 20)*.

To configure a Whatsapp touchpoint, complete the following steps:

1. Double click on the Whatsapp touchpoint.
   The **Whatsapp Messaging** page appears.
2. Provide values for the following fields:
    - **Name** - Mandatory.
    - **Description** - Not Mandatory.
3. Click **Next**.
   The **Select Communication** page appears.

4. Select the required template. If there are multiple templates, use the Search bar to locate the required template.
5. Click **Next**.
   The **Mapping** page appears.
6. Map the fields with the appropriate Journey fields (coming from the Data Definition associated with the Journey during Journeycreation). This is essential as the mapping changes the value on runtime.
   The mapping achieves personalization to the Whatsapp. In Deliver, if you map `FirstName` of Deliver to `fname` of Journey and the `LastName` to `lname`, the salutation in the whatsapp will be personalized to the value of the field.
7. Click **Save**.

Journey controls

Journey controls deals with the actions to be performed by configuring conditions before contacting the customer or after customer response.

After setting up the Touchpoint, you can apply conditions on the Touchpoints or to the responses of the Touchpoints. Journey controls contain the following actions:

- **Decision Split**
- **Engagement Split**
- **Join**
- **Delay**
- **Publish**
- **Database**

To add Journey controls, complete the following steps:

1. To add a Decision Split control, see Configuring a Decision Split control *(on page 30)*.

2. To add an Engagement Split control, see Configuring an Engagement Split control *(on page 32)*.
3. To add a Join control, see Configuring a Join control *(on page 33)*.
4. To add a Delay control, see Configuring a Delay control *(on page 34)*.
5. To add a Publish control, see Configuring a Publish control *(on page 35)*.

Configuring a Decision Split control

Use the Decision control (Decision split) to add conditions to the Entry Source data. The records which fulfill the condition will flow in the YES path and the remaining records will flow in the NO path.

Use conditions to automate the behavior of touchpoints with some business requirement conditions. Business requirements can include filtering a list of customers based on age, salary, etc.

To configure a Decision Split control, perform the following steps:

1. From the Journey Palette, drag-and-drop the **Decision Split** control.

   Note: If you drag-and-drop the **Decision Split** between the existing elements on a canvas, a confirmation dialog appears. Confirm whether you want the remaining flow to be added in the YES flow or the NO flow.

2. To configure the **Decision Split** control, double-click the control on the Canvas. The **Decision Split** page appears.

3. To configure the **Decision Split** control, complete the following steps:

   a. Enter an appropriate **Name**. A name is mandatory.

   b. Enter an appropriate **Description**. The description is optional.

   c. Use the toggle button to set the condition as **OR** or **AND**. By default, the condition is set to **AND**. The selection applies to all the rules within a group. The selected condition is applicable only if you add more than one rule in a group.

d. **Note:** A group contains one or more rules. A rule has a field, a condition, and a value for the condition to verify. It is mandatory to configure at least one group and a group must contain at least one rule.

   Create a rule by selecting the data field (same as the Data Definition field) in the first drop-down box, the condition in the second drop-down box, and entering the value in the third text box.

   When configuring Decision Split, the available operators will be shown based on the data type of the field in the data definition. String, Numeric, and Date fields have different operators.

   For configuring a date in Decision Split, the format of date field should match the Data Definition date format. Decision Split configuration will be unsuccessful if the date formats do not match.

e. To add more rules in a group, select **+ Add Rule**. To delete a rule, select the **X** succeeding the rule.

f. To add a group, select **+ Add Group**, and perform *Step c* to *Step e*.
   A parent group allows five levels of nesting in the sub-groups. However, any number of groups can be added at the same level.

g. To delete a group, select **Delete Group**.

   Note:
   - You can delete a group only if there are more than one groups. By default, Decision split control should contain at least one group with at least one rule.
   - When a group has nested sub groups and if you select the parent group for deletion, a confirmation box appears warning you that the sub-groups will also be deleted.

h. To save the **Decision Split**, select **Done**.

Note: Journey is not interpreting the data value for non-required fields and it is always considered as string for any value. Hence, null will be considered as null in the database and is null milestone condition will be evaluated only if that field is absent in input. Same is applicable for Milestone and Milestone analysis.

Configuring an Engagement Split control

Use the Engagement split control to engage with customers who have responded. You can also decide the next course of action for the users who have not responded too. The customers who have responded as per the events selected in Engagement split, will go in the `YES` path and the remaining customers will go in the `NO` path after the evaluation period has expired.

To configure an Engagement Split control, complete the following steps:

1. From the Journey Palette, drag the **Engagement Split** control after the added touchpoint. For information on adding a Touchpoint, see Touchpoints *(on page 20)*.
2. Double-click the added **Engagement Split** element.
   The **Engagement Split** dialog opens.
3. Provide values for the following fields:
   - **Name** - Mandatory
   - **Description** - Optional
4. Select the Touchpoint for which you want to add the **Engagement Split** control. Only the Touchpoints above the Engagement control will be available for selection. The options are:
   - **email**- all email Touchpoints above the **Engagement Split** control.
   - **sms**- all SMS Touchpoints above the **Engagement Split** control.
5. Perform one of the following steps:
   a. For the `email` Touchpoint, select one of the following events:
      - **Bounce**- For email IDs that bounced. A bounce event can be a hard bounce event or a soft bounce event.
      - **Open**- For customers who opened the email.

- **Link Clicked?**- For customers who clicked the link in the email.

Note:

- If you have selected Mailchimp as the default email connection, do not select the **Bounce** option because Mailchimp does not send Bounce events to Unica Journey. If you want to use the **Bounce** option, set Mandril as the default email connection. In case of Mandrill connector, Journey supports the hard bounce event and the soft bounce event. For setting the default email connection, see Setting a default email connection *(on page 65)*.

b. For the `sms` Touchpoint, select one of the following events:
  - **Sent**
  - **Delivered**

6. **Track Link** - For Deliver when you select the Link Clicked option, then all links present in template associated with the entered touchpoint are displayed in the dropdown of the Track link file. For Link, this field is displayed as a text field.

7. Set one of the following evaluation periods for customers to access the communication message:
   - **Duration** - Set the duration in days, hours, or minutes. By default, the minimum duration for Engagement Split evaluation period is 30 minutes.
   - **Wait till date** - Set the duration to a specific future date. By default, the next day's date is selected.

   Once the **Duration** or **Wait till date** elapses, Journey will assume that there are no events generated for the selected Touchpoint and the audience in the Journey will move to the `NO` path.

8. Click **Done**.

Configuring a Join control

Use the Join control to join or combine one branch of the canvas to another.

Example: You have sent an email and added an engagement control to split users into:

- `YES` - For users who clicked the link.
- `NO` - For users who did not click the link.

If you have already created an SMS engagement control in the same Journey Canvas, to engage with customers, you can use the Join control to connect the `NO` flow as an entry point into an SMS engagement control so that you can communicate with those customers via SMS.

Note:

- If a Join ends up in a circular loop, a pop-up appears providing you a warning.
- If you drag-and-drop a Join in between a flow, a confirmation pop-up appears mentioning that the flow below the join will be deleted.

To configure a Join control, complete the following steps:

1. From the Journey Palette, drag the **Join** control and drop it at the required `YES` or `NO` flow of a control. For information on adding a Touchpoint, see Touchpoints *(on page 20)*.
2. Drag the added **Join** control from its source to the destination where you want the flow to merge.

Configuring a Delay control

Adding a delay is similar to scheduling a Touchpoint to a specific date or time.

Delays are dependent on the time zones set during Journey creation. For more information, see Creating Journeys (on page 18).

To configure a Delay, complete the following steps:

1. From the Journey control panel within the Palette, drag-and-drop the **Delay** control before or after the added touchpoint. For information on adding a touchpoint, see Touchpoints *(on page 20)*.
2. Double-click the **Delay** control.
   The **Set Delay** dialog appears.
3. Provide the following values:
   a. Enter an appropriate **Name**. A name is mandatory.
   b. Enter an appropriate **Description**. The description is optional.
   c. Either select the **Duration** or select the **Wait till date** and provide the appropriate values.
   d. Click **Done**.

Configuring a Publish control

Use the Publish control to save contact details at a particular stage. You can use these contact details for analytics, reusing the CSV files and Kafka Entry source in other Journeys, or other actions.

Publish control gathers audience information at a particular stage and posts this information to a CSV file, a Kafka Entry source, or a Kafka topic. The file will be saved in the Journey server (engine). The file path is configured in the `spring.entity.files.upload.defaultPath` property inside the `application.properties` file of the Journey engine and the Journey web, and the paths should be the same in the Journey engine as well as the Journey web. The default output location of the Journey files is `<JOURNEY_ENGINE_HOME>/Files`.

To configure a Publish control, complete the following steps:

1. From the Journey control panel within the Palette, drag-and-drop the **Publish** control to the required part on Canvas.
   The **Publish** dialog appears.
2. Provide values for the following fields:

- **Name** - Mandatory
- **Description** - Optional

3. Select one of the following options to save the contacts:
    - **CSV** - The fields configured in Data Definition is exported to the `CSV` file. You can either provide a new CSV file name or type in the name of an existing CSV file. If you select an existing file, the data will be appended to the existing file.
    - **Kafka > Entry Source** - With a single Publish control, you can configure a maximum of 10 Kafka entry sources. Kafka entry sources, associated with Journeys, will not be listed while configuring the Kafka entry source on the Publish journey control. For a Journey, if a Kafka Entry Source is configured with a Publish Journey Control, and if that same Kafka Entry Source is associated with any other Journey, the data gets processed for the selected Journey as per the configured Data Definition.
    - **Kafka > Topic** - Posts audience information on a Kafka topic for use by third-party applications. Provide an appropriate name for the topic. The topic is stored on the Kafka server. A Kafka topic name can be up to 50 characters in length and should have `A-Z`, `a-z`, `0-9`, period (`.`), underscore (`_`), and hyphen (`-`).

4. Click **Save**.

Configuring a Database control

Enable orchestration with other system by inserting/updating database row or updating a raw sequel. This will be executed for every record in the Journey.

To configure a Database control, complete the following steps:

1. From the Journey control panel within the Palette, drag-and-drop the **Database** control to the required part on Canvas.
   The **Database Configuration** dialog appears.

2. Provide values for the following fields:
    - **Name** - Mandatory
    - **Description** - Optional

3. Click **Next**.
   The **Create New Action** page appears.

4. Default database connection is reflected in the Existing Connection field. Also, the defined properties of the database are reflected in the respective property fields.

5. Click **Next**.
   The **Field Mapping** page appears.

6. Map the **Database Fields** with **Journey Fields**.

7. Click **Save**.

Additional operations on Journey canvas

You can perform the following actions when you are on the Journey canvas screen:

Viewing or editing a Journey

To view or edit a Journey, complete the following steps:

1. For a Journey, on the Journey canvas screen, click **More Actions > View/Edit Details**.
   - You can add or remove Entry Sources and Data Definition of a Journey in Draft state.
   - Deleting the Data Definition will erase the canvas.
   - For a Published Journey, you can only change the Name, Description, and Folder.
   - For a Paused Journey, you can add or remove Entry Sources.

   The **Details** page appears.

2. Make the necessary changes and click **Save & proceed**. For more details, see Creating Journeys *(on page 18)*.

3. If required, you can edit or delete the Touchpoints and Control configurations for a Draft Journey or a Paused Journey and click **Save** to save the Journey in Draft state. You can also click **Publish** to publish the Journey.

Duplicating a Journey

You can also duplicate Journeys from the Journey listing page. For more information, see Duplicating a Journey (on page 47).

You can duplicate a Journey in any state (Published, Draft, Paused, or Completed). The newly created Journey, after duplication, will be in Draft state. Since the newly created Journey is in a draft state, duplicating a Published Journey does not automatically resend communication to the customer.

To create a copy of an existing Journey, complete the following steps:

1. For a Journey, on the Journey canvas screen, click **More Actions > Duplicate**.
   The **Duplicate Journey** dialog appears.
2. Click **Copy** to create a copy.
   All details of existing Journey, which includes Entry Sources, Data Definitions, and Journey canvas with their configurations, will be copied.

   Note: If any goals are configured, they will not be copied.

   If required, you can change the Entry Source or Data Definition. Changing the Data Definition, in a copied Journey, will erase the copied Journey canvas. A confirmation dialog appears before deleting the canvas.

   The newly duplicated Journey will open in Canvas mode.

Deleting a Journey

You can also delete a Journey from the Journey listing page. For more information, see Deleting Journeys (on page 46).

You can only delete a Journey that is in **Draft** state.

To delete a Journey, complete the following steps:

1. For a Journey, on the Journey canvas screen, click **Delete** to delete the Journey.
   A confirmation box appears.
2. Click **Yes** to delete the Journey.

   All details of existing Journey, which includes Entry Sources, Data Definitions, and Journey canvas with their configurations, will be deleted.

Exiting a Journey

To exit from the Journey canvas page, complete the following step:

For a Journey, on the Journey canvas screen, click **Exit** to exit the Journey canvas screen.

Saving a Journey

To save a Journey, complete the following step:

For a Journey, on the Journey canvas screen, click **Save** to save the added or updated details of Journey.

Publishing a Journey

Publishing a Journey starts the execution of a Journey. Journey execution does not have options like test run or production run. Publishing a Journey directly executes the production run. You cannot publish a Journey if any Touchpoint or Journey control is not configured. You should have appropriate permissions to Publish or Pause a Journey. For more information, see Assigning permissions to Journey Roles (on page).

To test a Journey, assign the Entry Source, containing the sample data, to the Journey and publish the Journey. This helps you to run the sample audience, or test audience, from the Journey and validate your Journey design. Once you verify the Journey with the sample data, pause the Journey and change the Entry Source to point to the production Entry Source. After this, you can republish the Journey with production data.

To publish a Journey, complete the following step:

For a Journey, on the Journey canvas screen, click **Publish** to publish the Journey.

Pausing and Editing a Journey

You can pause and edit a Published Journey.

The rules for editing a Journey in a Paused state are as follows:

- You can only modify the Name field, Description field, and the Folder location for Journeys in Published state.
- You can modify the Journey canvas when a Journey is in Paused state.
- You can add Entry sources for Journeys in Draft and Paused state.

After editing the Paused Journey, republish the Journey to start the execution.

To pause and edit a Journey, complete the following steps:

1. Select  **> Published**.
2. Select a Journey for modification. For more information, see Modifying the details of a Journey *(on page 45)*.
   The Journey canvas for the selected Journey appears.
3. Click **Paused and Edit**.
   A confirmation box appears.
4. Click **Pause**.
   The Journey is paused and the Journey entry will be moved to the Paused Journeys listing page.

Marking a Journey as complete

You can manually mark a Journey as complete or you can automate it by setting goals. For automating the completion, see Journey Goals (on page 49). You can only mark a Published Journey as complete.

To manually mark a Journey as complete, complete the following steps:

1. Select  **> Published**.
2. Select a Journey to mark it as complete. For more information, see Modifying the details of a Journey *(on page 45)*.
   The Journey canvas for the selected Journey appears.
3. Select **More Actions > Mark a Journey as complete**.
   The Journey is marked as complete.

Operations on Journey listing page

The Journey listing page is split into four tabs:

- Published
- Draft
- Paused
- Completed

Fields in Journey listing pages

The Journey listing pages are split into four tabs, where each tab represents the status of a Journey. Each tab has its own list of fields. Some fields are default fields.

Fields in the Published Tab

The following table lists all the fields available and the customizable fields in the Published Journeys listing page.

Table 3. Fields in the Published Tab

Field Name	Default Field?
Code	Yes
Created by	No
Data definition associated	No
Description	No
Entry sources associated	No
Goal progress	Yes
Last modified by	No
Last modified on	Yes
Marketing stage	Yes
Name	Yes
Published on	Yes

Fields in the Draft Tab

The following table lists all the fields available and the customizable fields in the Draft Journeys listing page.

Table 4. Fields in the Draft Tab

Field Name	Default Field?
Created by	No
Created on	No

Field Name	Default Field?
Code	Yes
Data definition associated	Yes
Description	No
Entry sources associated	Yes
Last modified on	Yes
Last modified by	No
Marketing stage	Yes
Name	Yes

Fields in the Paused Tab

The following table lists all the fields available and the customizable fields in the Paused Journeys listing page.

Table 5. Fields in the Paused Tab

Field Name	Default Field?
Code	Yes
Created by	No
Data definition associated	No
Entry sources associated	No
Description	No
Goal progress	No
Last modified by	No
Last modified on	Yes

Field Name	Default Field?
Marketing stage	Yes
Name	Yes
Paused on	Yes
Published on	No

Fields in the Completed Tab

The following table lists all the fields available and the customizable fields in the Completed Journeys listing page.

Table 6. Fields in the Completed Tab

Field Name	Default Field?
Code	Yes
Completed on	Yes
Created on	No
Data definition associated	No
Description	No
Entry sources associated	No
Goal achieved	Yes
Last modified by	No
Marketing stage	Yes
Name	Yes
Published on	No

Adding or removing listed columns in Journeys

You can add or remove columns from listing pages for Published Journeys, Draft Journeys, Paused Journeys, and Completed Journeys.

- For more information on fields in the Published Journeys tab, see Table 3: Fields in the Published Tab *(on page 42)*.
- For more information on fields in the Draft Journeys tab, see Table 4: Fields in the Draft Tab *(on page 42)*.
- For more information on fields in the Paused Journeys tab, see Table 5: Fields in the Paused Tab *(on page 43)*.
- For more information on fields in the Completed Journeys tab, see Table 6: Fields in the Completed Tab *(on page 44)*.

To customize the fields view in the Journey listing page, complete the following steps:

1. Select **Add/Remove Column**.
2. Select or Deselect the fields that you want to add or remove. Click **Reset Default** if you want to view default fields.
3. Click **Apply** to save the selection.

Modifying the details of a Journey

You can modify the details of a Journey from the Journey listing page.

Editing rules are as follows:

- You can modify all fields and the Journey canvas for journeys in Draft state.
- You can only modify the Name field, Description field, and the Folder location for journeys in Published state, Paused state, or Completed state.
- Journey canvas will be editable for journeys in Draft and Paused state.
- Journey canvas will be non-editable for journeys in Completed and Published state.
- You can add Entry sources for journeys in Draft and Paused state.

You can also modify Journey Details from inside the Journey canvas. For more information, see Viewing or editing a Journey (on page 37).

To modify a Journey, complete the following steps.

1. Hover the cursor over the required Journey.
2. Select the > icon. Alternatively, click the Journey Name.
3. Make the required modifications. For more information, see Creating Journeys *(on page 18)*.
4. To save the modifications, click **Update journey**.

Moving Journeys to another folder

You can move journeys only from the listing page. You can only view the journeys in the Folders page.

To move a journey, or multiple journeys, complete the following steps.

1. Use one of the following methods:
   a. To move a single Journey, you can either hover the cursor over the required journey and select > , or select the checkbox preceding the required Journey and click **Move to folder**.
   b. To move multiple journeys, select the checkbox preceding the required journeys and click **Move to folder**.
2. Select the required destination folder and click **Move here**.

Deleting Journeys

To delete a Journey, or multiple Journeys, you have to access the Journey listing page. You can only delete Journeys that are in Draft state.

You can also delete Journeys from inside the Journey canvas. For more information, see Deleting a Journey (on page 38).

To delete a Journey, or multiple Journeys, complete the following steps.

Use one of the following methods.

a. To delete a Journey, you can either hover the cursor over the required Journey and select **>** , or select the checkbox preceding the required Journey and click **Delete**.
b. To delete multiple Journeys, select the checkbox preceding the required Journeys and click **Delete**.

Duplicating a Journey

You can either duplicate the Journey from the Journey listing page or from the Journey canvas page. You can duplicate a Journey in any state (Draft, Published, Paused, or Completed). A duplicated Journey's status, at the beginning, will be in Draft state.

To create a duplicate of a Journey, complete the following steps:

1. Select one of the following tabs in the Journey listing page:
   - **Published**
   - **Draft**
   - **Paused**
   - **Completed**
2. Hover over the required Journey and select **>** .
   The **Duplicate Journey** dialog appears.
3. Provide an appropriate name and click **Save**.

Journey Settings or Deduplication

Unica Journey takes input from multiple Entry Sources like file, REST, Kafka, Unica Campaign, Unica Interact, Unica Discover etc. Sometimes an existing audience record might get pushed to the same Journey multiple times. For example, Unica Campaign type entry sources using Kafka could push the same audience information from each run of flowchart to the Journey. Similarly, REST or file-based Entry Source might also send the same audience record in to the Journey. You can use Journey Settings to identify the duplicate records and specify the action to be taken on the duplicate records. The available actions are deleting the duplicates or updating the existing record with new data.

Deduplication works on the Required fields of Data Definition. This setting can be added to only to Journeys in Draft state.

To set deduplication of contacts, complete the following steps:

1. For a Journey, on the Journey canvas screen, click **More Actions > Settings**.
   The **Journey Settings** page appears.
2. **CAUTION:** You cannot change the selected option once the Journey is published.

   Select one of the following options:
   - **Allow duplicate contacts** - Select this option if you want to allow duplicate contacts. This is the default setting.

     Example: If an email ID `john.doe@example.com` already exists, another entry having the same email ID is considered as a new record.
   - **Dont allow duplicate contacts** - Select this option if you do not want to allow duplicate contacts.
     a. In the **Select Field** option, select any Required field as mentioned in Data Definitions *(on page 12)* to specify the identity for recognizing duplicate contacts. Click to add an extra field. Click to remove the added field. For more information on **Select Field**, see Data Definitions *(on page 12)*.

b. Select one of the following actions on duplicate contacts:
   - **Discard contact** - Discards any new duplicates found. For example, if an email ID `john.doe@example.com` already exists, it will discard the new entry if the entry contains the same email ID.
   - **Update existing contact** - Updates the existing contact with the newly found duplicate. For example, if a record has Name, Address, Email ID, and Gender, with Email ID as the significant field and Gender as the optional field, and if you update the record by adding value to Gender, the system will identify that the Email ID is the same but the value for the Gender field did not exist earlier, so the system will update the existing contact.

c. Click **Save & close**.

Journey Goals

Journey application provides the provision of setting up a Goal/Goals in Journey. Goal can be of Date based, Contact/responses based or Sales based. You can set either a date-based, Contact/responses based or Sales based goal for the following Journey stages: Draft, Paused, or Published. On the add/edit goal page you will see a list of all the email and SMS touchpoints configured on canvas in 'Select Touchpoint' drop-down list.

- For Email - Supports Email sent, Email opened and Link clicked events
- For SMS - Supports SMS sent and SMS delivered event

Note: V12.1 Fixpack3 onwards we can add multiple goals, maximum 15 goals in one Journey. Also, we can create Sales-based goals.

Date-based goal	For date-based goal if target date is achieved, the Journey will be marked as **Completed**. For setting up date based goal certain validations are provided to calculate

	maximum delay configured in Journey so that the marketer can configure target goal date which is higher than the max configured delay. Once target date is set as a goal, user cannot reduce the target date. User can only increase the target date. User can reset date-based goal at any point of time and add a new goal. **Note:** Only one Date based goal can be added for a Journey.
Contact/responses-based goal	For adding Contact/responses based goals, touchpoints should be configured and saved in Journey. If frequency is off then**Mark Journey as complete when the goal is achieved** check box is available. If the check box is checked, then as the contact/responses based target is achieved for a touchpoint and its event, the Journey will be marked as Complete. If frequency is on then **Mark Journey as complete when the goal is achieved** check box is not available and even after the contact-based target is achieved for a touchpoint, the Journey will continue to run in Published state and will continue to capture all the events. By default, option weekly is selected but it can be changed to Daily, Monthly or Quarterly.
Sales-based goal	For adding Sales based goals, CRM/ Salesforce touchpoint should be configured and saved in Journey. Sales based goal is

	created by setting leads target. If frequency is off then **Mark Journey as complete when the goal is achieved** check box is available. If the check box is checked, then as the Sales target is achieved for a touchpoint and its event, the Journey will be marked as Complete. The tracking parameters of Sales-based goal is same as Date-based and Contact/responses-based goals except, the select object can be either Lead or Contact and Action can be either Created or Updated. If frequency is on then **Mark Journey as complete when the goal is achieved** check box is not available and even after the Sales target is achieved for a touchpoint, the Journey will continue to run in Published state and will continue to capture all the events. By default, option weekly is selected but it can be changed to Daily, Monthly or Quarterly.

Note: Frequency of goals for Daily, Weekly, Monthly or Quarterly basis will be considered as per the standard calendar. All calculations will happen as per Journey Timezone settings .

When Journey is in draft stage, user can switch goal from date-based to contact/responses-based or Sales-based goal and vice-versa.

To add a Journey goal or to edit a Journey goal, complete the following steps:

Note: Before you add a goal, ensure that the Journey canvas has a Touchpoint configured in it.

1. For a Journey, on the Journey canvas screen, click **Add/Edit Goal**.
   The **Add/Edit Goal** dialog appears.
2. To set your goal based on dates, select **Date** and complete the following steps:
   a. For the **Goal Target Date** field, set a future date and time.
      Date-based goal is dependent on the time zone that was set during Journey creation. By default, the next day's date and time.
3. To set your goal based on number of contacts that responded, select **Number of contacts?** and complete the following steps:
   a. **Note:** You must add a Touchpoint to see values in the **Select Touchpoint** field and the **Select Event** field. If you do not add a Touchpoint, the drop-down will not have any values.

      Select a **Touchpoint** and select the corresponding **Event**.
   b. For Deliver when you select the Link Clicked option, then all links present in template associated with the entered touchpoint are displayed in the dropdown of the Select Link field. For Link, this field is displayed as a text field. For Email touchpoint, options Emails_Open and Email_Sent are available in Event field dropdown. For SMS touchpoint, options SMS_Deliver and SMS_Sent are available in Event field dropdown.
   c. Add a positive number for the **Target** field. When the Journey goal meets the entered value, it will be an indication that the Journey has met the goal. The Journey can continue or be closed.
   d. If you want to mark a Journey as complete, once the **Target** goal is met, select the checkbox **Mark Journey as complete when the goal is achieved**.

   View Multiple Goals

   While adding a new goal, you can see list of existing goals for a Journey. For each goal, the name of the goal is displayed on the left side if the screen followed by other details like goal type, frequency, target and goal achieved. On the right side of the screen goal tracking details are displayed. Clicking on goal name displays the goal performance in doughnut chart. Based on goal progress (target achieved), the doughnut chart is displayed in different colours.

- 100% - Full dark green
- Above 75% - Light green
- Above 50% - Yellow
- Above 25% - Orange
- Below 25% - Red

Edit Goals

When the Journey is in Draft stage, you can edit the entire goal (Goal Name, Goal type, Frequency and Goal target). When the Journey is in Published or Paused, you can only edit Goal name and Goal target. In edit mode, for date based goals user can only select date greater than the existing date. While editing a non-frequency based goals, if Goal achieved count is equal to or less than the target value then while checking the checkbox Mark Journey as complete when the goal is achieved, an error is displayed saying Goal achieved count and the target value cannot be same. Increase the target value.

Note: In edit, paused and publish mode for frequency goals the value of Goal target can be increased or decreased but for non-frequency goals the value of goal target can only be increased.

Note: V12.1 Fixpack 3 onwards you can view Goals' historical performance and can also edit goals.

Journey statistics

You can view Journey statistics when a Journey is Published or Completed.

Journey statistics for Contacts

Hover over the **Start** point to view the statistics of the contacts that entered the Journey from various Entry Sources.

Field	Description
Contacts	The number of contacts, per Entry Source, that were either **Accepted** or **Rejected** by the Journey.
Total	The total number of contacts from all Entry Sources that were either **Accepted** or **Rejected** by the Journey.

Journey statistics for Touchpoints

Once a Journey is Published or Completed, you can open the Journey canvas and hover over the following Touchpoints to view the Journey statistics

Touchpoint	Statistics provided
Email	Journey provides the following statistics for the Email Touchpoint • Sent • Bounce Soft • Bounce Hard • Open • Link Click • Error
SMS	Journey provides the following statistics for the SMS Touchpoint • Sent • Delivered • Link Click • Error
Salesforce	Journey provides the following statistics for the SMS Touchpoint

Touchpoint	Statistics provided
	• Success • Failure
Whatsapp	Journeyprovides the following statistics for the Whatsapp Touchpoint • Sent • Delivered • Error • Read

Journey statistics for Journey controls

Click on the Journey start point to see total number of audience. Audiences are bifurcated in both section Accepted (Valid data on which action is taken) and Rejected (Invalid/ incorrect data). Click on touchpoints to view list of audience entry source wise and total list. Further when you click on the individual status number a popup is displayed with details of data definition fields of the records moving in different branches.

When you click on the email icon, then count of emails send through different channels (Mailchimp and Mandrill) is displayed.

Note: In case of count as 0 this link should be disabled. the page will have no custom sort, by default they are sorted by descending, date and time of response. The popup has pagination.

In case of Publish control, hover over the control to see the total number of contacts stored.

In case of Decision Split control or Engagement Split control you see the following numbers:

- A callout containing the number of contacts entering the control.
- A callout containing the number of contacts in the YES flow.
- A callout containing the number of contacts in the NO flow.

Journey Status

A Journey can have one of the four following status: Draft, Published, Paused, Completed.

Viewing published Journeys

The Published Journeys listing page lists all the published journeys from the selected folder.

You can perform a set of operations on the Published Journeys listing page.

1. To view published journeys from a specific folder, see Viewing artifacts within a folder *(on page 82)*.
2. To add or remove columns from the listing page, see Adding or removing listed columns in Journeys *(on page 45)*.
3. To modify a published Journey, see Modifying the details of a Journey *(on page 45)*.
4. To move published journeys from one folder to another, see Moving Journeys to another folder *(on page 46)*.

Viewing draft Journeys

The Draft Journeys listing page lists all the published journeys from the selected folder.

You can perform a set of operations on the Draft Journeys listing page.

1. To view draft journeys from a specific folder, see Viewing artifacts within a folder *(on page 82)*.
2. To add or remove columns from the listing page, see Adding or removing listed columns in Journeys *(on page 45)*.
3. To modify a draft Journey, see Modifying the details of a Journey *(on page 45)*.
4. To move draft journeys from one folder to another, see Moving Journeys to another folder *(on page 46)*.
5. To delete draft journeys, see Deleting Journeys *(on page 46)*.

Viewing paused Journeys

The Paused Journeys listing page lists all the paused journeys from the selected folder.

You can perform a set of operations on the Paused Journeys listing page.

1. To view paused journeys from a specific folder, see Viewing artifacts within a folder *(on page 82)*.
2. To add or remove columns from the listing page, see Adding or removing listed columns in Journeys *(on page 45)*.
3. To modify a paused Journey, see Modifying the details of a Journey *(on page 45)*.
4. To move paused journeys from one folder to another, see Moving Journeys to another folder *(on page 46)*.

Viewing completed Journeys

The Completed Journeys listing page lists all the completed journeys from the selected folder.

You can perform a set of operations on the Completed Journeys listing page.

1. To view completed journeys from a specific folder, see Viewing artifacts within a folder *(on page 82)*.
2. To add or remove columns from the listing page, see Adding or removing listed columns in Journeys *(on page 45)*.
3. To modify a completed Journey, see Modifying the details of a Journey *(on page 45)*.
4. To move completed journeys from one folder to another, see Moving Journeys to another folder *(on page 46)*.

Reports

Click on published Journey to view Journey summary, performance, Goals, Audience Activity/Logs and Milestones.

Note: V12.1 Fixpack 3 onwards we can access the Reports page for Journey analysis.

Summary

Click on summary tab to view the Journey canvas. At the top of the screen milestone details are displayed. Click on summary tab to view the Journey canvas. At the top of the screen milestone details are displayed. Hover on cursor over the start icon of Journey canvas, to see contact names along with the total accepted and rejected count. Hover on the Email touch points to know the count of Email sent, bounce soft, bounce hard, open, link click and error. Hover on the SMS touchpoint to know the count of total SMS sent, delivered, link click and error. When you click on the count, pop-up appears displaying further details related to that count. This pop-up will not appear for Adtech touch points.

Performance

Click on performance tab to view Email Performance and SMS Performance

Email Performance : To review the performance of Email inside the journey. This section will give user the information about the over all performance of the Email sent, delivered, and clicks.

- **Delivery** – Display counts of total emails sent with any touchpoint versus the emails successfully delivered.
    - When you click on Delivery tile, Email performance - Total Delivered pop-up appears. The pop-up displays the following information, Touchpoint, Template name, Channel, Sent and Delivered.

      Note: For Deliver template name is displayed for all the channels but for Link, template name is displayed only for emails sent through Mandril.

- **Open** – Display count of total emails sent with any touchpoint and the count of unique opens, this means total number of people who opened the email but this will count a person only once even if they have opened the email multiple times.
    - When you click on Opens tile, Email performance - Unique Opens pop-up appears. The pop-up displays the following information, Touchpoint, Template name, Channel and Opens.
- **Clicks** – Display count of total emails sent with any touchpoint and unique clicks, this means total number of people who opened the email but this will count a person only once even if they have opened the email multiple times.
    - When you click on Clicks tile, Email performance - Unique Clicks pop-up appears. The pop-up displays the following information, Touchpoint, Template name, Channel, Link and Clicks.

  Each of this information has pia chart representation displaying the percentage of Emails delivered, Unique opens and Unique Clicks.
- **Average Integration Time** – Display the average integration time by recording the email opens and clicks time.

SMS Performance: To review the performance of the SMS inside the journey. This section will give user the information about the over all performance of the SMS sent and delivered.

- **Delivery** – Display counts of total SMS sent with any touchpoint versus the SMS successfully delivered.

Refresh - See Common Functional Keys (on page 63)

Export Report - See Common Functional Keys (on page 63)

Time Period- See Common Functional Keys (on page 63)

More Actions- Following options are present in the drop-down.

- View/Edit Details - See Viewing or editing a Journey (on page 32) *(on page 37)*
- Settings - See Journey Settings (on page 43) *(on page 48)*
- Mark Journey as Complete - See Marking a Journey as Complete (on page 36) *(on page 41)*

- Duplicate - See Duplicating a Journey (on page 33) *(on page 38)*

Exit - Click this to exit the performance screen

Add/Edit Goal - To add or edit a goal, see Add/Edit Goal (on page 45) (on page 52)

Pause and Edit - To pause or edit journey, see Pausing and Editing a Journey (on page 35) (on page 40)

Goals

Click on Goals tab to view Goals progress report. After adding a goal, you can see the progress of each goal in graphical format. This section gives information about the goal target, goal completed and the goal complete rate in percentage.

You can select the goal for the dropdown present on the right side of the screen and the respective progress graph will be displayed. By default, goal at the top will be selected. You can select the time period and also the frequency from

- Daily
- Weekly
- Monthly
- Quarterly

based on the frequency selected, goals progress graph will be displayed. By default, monthly is selected.
Graph/charts are displayed based on the goals type, like:

- Date-based goal - Donut chart
- Frequency-based goals - Bar chart
- Non- Frequency based goals - Line chart

Note: This graph is available only if user has created or defined goals in journey.

Audiences

Click on Audiences tab to view the total number of audiences who became part of the journey. The graph display total number of audiences and audiences count from different entry sources. You can select the entry sources from the Select source drop-down. By default, all the entry sources are selected. At the top right side of the screen last generated date and time is displayed. You can also select time period and frequency and accordingly the audience graph will be displayed. By default, monthly is selected.

Refresh - See Common Functional Keys (on page 63)

Export Report - See Common Functional Keys *(on page 63)*

Note: Y axis range displayed on the Audiences screen can be different from the one displayed in the Export report.

Time Period- See Common Functional Keys (on page 63)

More Actions- Following options are present in the drop-down.

- View/Edit Details - See Viewing or editing a Journey (on page 32) *(on page 37)*
- Settings - See Journey Settings (on page 43) *(on page 48)*
- Mark Journey as Complete - See Marking a Journey as Complete (on page 36) *(on page 41)*
- Duplicate - See Duplicating a Journey (on page 33) *(on page 38)*

Exit - Click this to exit the performance screen

Add/Edit Goal - To add or edit a goal, see Add/Edit Goal (on page 45) (on page 52)

Pause and Edit - To pause or edit journey, see Pausing and Editing a Journey (on page 35) (on page 40)

Milestones

V12.1 Fixpack 4 onwards, we can access the Milestones screen. Click on Milestones tab to view Milestones Analysis report. This section give details related to audience drop between two milestones and average time for achieve milestones. You can view the progress in funnel or graph view, with toggle switch the desired option can be selected. If you select the graph view then below there is a drop graph available, hover on that graph will display drop percentage and average time in days (time format is DDHHMM).

Based on milestones achieved, the funnel chart is displayed in different colours.

- 100% - Full dark green
- Above 75% - Light green
- Above 50% - Yellow
- Above 25% - Orange
- Below 25% - Red

Note: Milestone graph is available only if user has defined milestones in journey. The milestones will be displayed in the same sequence in which they were added.

Average Time - When you upgrade from version 12.1.0.3 to 12.1.0.4 then average time is displayed as 0. After data refresh the average time displayed will be the difference between the audience linked with Journey and data refresh.

Funnel View - Click this toggle switch to view the milestones performance in funnel view or graph view.

Refresh - See Common Functional Keys (on page 63)

Export Report - See Common Functional Keys (on page 63)

More Actions- Following options are present in the drop-down.

- View/Edit Details - See Viewing or editing a Journey (on page 32) *(on page 37)*
- Settings - See Journey Settings (on page 43) *(on page 48)*
- Mark Journey as Complete - See Marking a Journey as Complete (on page 36) *(on page 41)*
- Duplicate - See Duplicating a Journey (on page 33) *(on page 38)*

Exit - Click this to exit the performance screen

Add/Edit Goal - To add or edit a goal, see Add/Edit Goal (on page 45) (on page 52)

Pause and Edit - To pause or edit journey, see Pausing and Editing a Journey (on page 35) (on page 40)

Common Functional Keys

Refresh - Click Refresh button to refresh the data.

Export Report - Click this to export Journey performance report in PDF format. The Export Report option is available for published and completed Journey. Exported report will have Journey metadata, performance graphs and selected parameters. Before exporting the report ensure that the graph is fully loaded.

Time Period- Click this to select the duration for which you wish to see the performance report. By default Current/This month option is selected, also, you can select any timeframe from the below mentioned options:

- Last 7 days
- Last 30 days
- Current/This month
- Last month
- Last 3 months
- Last 6 months
- Last year
- This year
- All Time
- Custom date range

Chapter 6. Journey chaining

Unica Journey contains capabilities for drip marketing. Marketers can run different Journeys for a single audience group and serve customers with better communications in each stage of marketing.

Audience flow from one Journey can easily be triggered to move into a new Journey. Unica Journey uses Publish control to push data in to another Entry Source. Journeys, using this Entry Source, triggers the flow of audience in it.

You can output the data from one Journey into flat file using the Publish Touchpoint. This data can be used as a static input for other Journeys.

Chapter 7. Settings

Use the settings menu to manage the Journey integrations like Email connectors, SMS connectors, CRM connections, and REST integrations.

Setting a default email connection

If you have multiple connectors to Unica Link for sending an email, you can set the default email connection in the **Settings** menu.

To set a default email connection, complete the following steps:

1. Select **> Link > Email**.
   The **Email** page appears.
2. From the **Available Connections** list, select a connection.
   The available connection includes Mandril, Mailchimp, etc.
3. Click **Save**.
   You can also deselect an existing connection and click **Save**. This ensures that no default connection is set.

Setting a default SMS connection

If you have multiple connectors to Unica Link for sending an SMS, you can set the default SMS connection in the **Settings** menu.

To set a default SMS connection, complete the following steps:

1. Select **> Link > SMS**.
   The **SMS** page appears.

2. From the **Available Connections** list, select a connection.

   Note:

   Phone number formats should be mentioned as per the specification of the delivery channel. Journey will send the phone number in the same format to delivery channel. For example, in reference Twilio connection phone number format supported with Journey is as follows:

   - *<plus sign><country-code><10-digit phone number>* - `+15403241212`.
   - *<plus sign> <country-code <(area-code)> <three-digit number><four-digit number>* - `+1 (540) 324 1212`.
   - *<plus sign>-<country-code>-<area-code>-<three-digit number>-<four-digit number>* - `+1-540-324-1212`.
   - *<plus sign> <country-code>-<area-code>-<three-digit number>-<four-digit number>* - `+1 540-324-1212`.

   Whatever format of phone number you provide, Unica Journey will save the number in the following format: <plus sign><country-code><10-digit phone number>. For example, if you provide phone number as `+1 540-324-1212`,Unica Journey stores the phone number as `+15403241212`.

   If you select Twilio as the default SMS connection, it will accept phone numbers only in the following format: *<plus sign><country-code><10-digit phone number>*. For example, `+15403241212`.

3. Click **Save**.

Setting a default CRM connection

If you have multiple CRM connections, you can set the default CRM connection in the **Settings** menu.

To set a default CRM connection, complete the following steps:

1. Select **> Link > CRM**.
   The **CRM** page appears.
2. From the **Available Connections** list, select a connection.
3. Click **Save**.

Setting a default ADTECH Connection

If you have multiple ADTECH connectors, you can set the default email connection in the **Settings** menu.

To set a default email connection, complete the following steps:

1. Select **> Link > ADTECH**.
   The **ADTECH** page appears.
2. From the **Available Connections** list, select a connection.
   The available connection includes Mailchimp, Twillo and Salesforce.
3. Click **Save**.
   You can also deselect an existing connection and click **Save**. This ensures that no default connection is set.

Setting a default LinkedIn connection

You can set LinkedIn as a default connection

To set a default LinkedIn connection, complete the following steps

1. Select **> Link > Manage connections**and click **New connection** button.

2. On **Create New Connection** add any Name and click on **Next** button.
3. Select **Choose Connection Type** type as LinkedIn Ads and click on **Next** button.
4. On **Connection Properties** page, click on Get code button, user will navigate to LinkedIn login page, add LinkedIn a/c user-id and password
5. After successful login, copy LinkedIn browser url and paste it on Create New Connection page in text field **Redirect Url response**.
6. Click on **Get Token** button, then click on **Test**, once Test connection is successful click on **Save** button.

   Note: From version 12.1.0.4 onwards, LinkedIn responses are modified and following responses will be available on configured LinkedIn touchpoint. **Audience size**, **Matched count** and **Audience status**. Unica link will send these responses to Journey and depending on link response, Audience size, Matched count and Audience status will be available on LinkedaIn touchpoint.

Setting a default Database connection

If you have multiple Database connectors, you can set the default email connection in the **Settings** menu.

To set a default email connection, complete the following steps:

1. Select **> Link > Database**.
   The **Database** page appears.
2. From the **Available Connections** list, select a connection.
3. Click **Save**.
   You can also deselect an existing connection and click **Save**. This ensures that no default connection is set.

Manage connections

You can manage Unica Link connections from this menu.

You can create a connection with Unica Link connectors like Mailchimp, Mandrill, Salesforce, and Twilio. You can view all existing connections in the Existing Connections (n) panel, where n is the number of connections.

1. To create a Mailchimp connection, complete the following steps:
    a. Select **> Link > Manage Connections > Create New**.
    The **Create New Connection** page appears.
    b. Provide values for the following fields:
        - **Name** - Mandatory
        - **Description** - Optional
    c. Click **Next**.
    d. From the **Choose Connection** panel, select **Mailchimp**.
    e. In the **Connection Properties** panel, provide values for the following mandatory fields:

    Note: To know about the fields and the values to be put, see *Unica Link Mailchimp User Guide*.

        - **Base URL**
        - **User ID**
        - **API Key**
        - **Activity Fetch Frequency**
        - **Activity Fetch Units**

f. Click **Test** to the test the connection. If the provided values are correct, you will see a success message. If the provided values are incorrect, you will see an error message.

g. To save the connection, click **Save**.
The new connection is successfully saved and it appears in the **Existing Connections** panel.

2. To create a Mandril connection, complete the following steps:

a. Select **> Link > Manage Connections > Create New**.
The **Create New Connection** page appears.

b. Provide values for the following fields:
- **Name** - Mandatory
- **Description** - Optional

c. Click **Next**.

d. From the **Choose Connection** panel, select **Mandrill**.

e. In the **Connection Properties** panel, provide values for the following mandatory fields:

Note: To know about the fields and the values to be put, see *Unica Link Mandrill User Guide*.

- **API Key**
- **Activity Fetch Frequency**
- **Activity Fetch Units**

f. Click **Test** to the test the connection. If the provided values are correct, you will see a success message. If the provided values are incorrect, you will see an error message.

g. To save the connection, click **Save**.

The new connection is successfully saved and it appears in the **Existing Connections** panel.

3. To create a Salesforce connection, complete the following steps:

    a. Select **> Link > Manage Connections > Create New**.

    The **Create New Connection** page appears.

    b. Provide values for the following fields:
        - **Name** - Mandatory
        - **Description** - Optional

    c. Click **Next**.

    d. From the **Choose Connection** panel, select **Salesforce**.

    e. In the **Connection Properties** panel, provide values for the following mandatory fields:

    Note: To know about the fields and the values to be put, see *Unica Link Salesforce User Guide*.

        - **Instance URL**
        - **Access Token**
        - **Version**

    f. Click **Test** to the test the connection. If the provided values are correct, you will see a success message. If the provided values are incorrect, you will see an error message.

    g. To save the connection, click **Save**.

    The new connection is successfully saved and it appears in the **Existing Connections** panel.

4. To create a Twilio connection, complete the following steps:

    a. Select **> Link > Manage Connections > Create New**.

    The **Create New Connection** page appears.

b. Provide values for the following fields:
   - **Name** - Mandatory
   - **Description** - Optional

c. Click **Next**.

d. From the **Choose Connection** panel, select **Twilio**.

e. In the **Connection Properties** panel, provide values for the following mandatory fields:

   Note: To know about the fields and the values to be put, see *Unica Link Twilio User Guide*.

   - **Base URL**
   - **Account SID**
   - **Auth Token**
   - **From Number**
   - **Retry Interval**
   - **Retry Attempts**

f. Click **Test** to the test the connection. If the provided values are correct, you will see a success message. If the provided values are incorrect, you will see an error message.

g. To save the connection, click **Save**.
   The new connection is successfully saved and it appears in the **Existing Connections** panel.

REST Integration

REST keys are used for third-party login to the application. You can generate key-value pair and using the key value pair, you can login to Journey using third-party applications.

Creating a new REST integration

To create a new REST integration key pair, complete the following steps:

1. Select **> REST**.

   The **REST** page appears.

2. Click **+ REST Integration**.

   The **New REST Integration** page appears.

3. Provide values for the following fields:
   - **App Name** - Mandatory.
   - **Description** - Optional.

4. Click **Generate Keys**.

   The system generates a **ClientID** and **ClientSecret**.

5. Use the toggle bar to change the **Status** to `Active` or `Inactive`. By default, the **Status** is `Active`.

6. To save the REST integration, click **Save**.

   To send audience data to Journey, follow the details mentioned on the REST Entry Source used for configuring the REST end point. Use the **ClientID** and **ClientSecret**, which you received when executing Step (4), for configuring the REST end point on Entry Source. For more information, see Creating Entry sources *(on page 7)*.

Viewing REST integration list

Unica Journey maintains a list of REST integrations created.

To view a list of REST integrations, complete the following steps:

1. Select **> REST**.

   The **REST** page appears.

2. Perform any one of the following operations:
    a. To view the list of REST integrations in ascending order or descending order on the Name field, click **Name**.
    b. To view the list of REST integrations in ascending order or descending order on the Description field, click **Description**.

Modifying an existing REST integration

You can only modify the description and the status of an existing REST integration.

To modify an existing REST integration, complete the following steps:

1. Select  **> REST**.
   The **REST** page appears.
2. To modify a rest integration, you can either:
    - select the required REST integration from the list
    - select **>**

   The **Update REST Integration** page appears.
3. You can update only the following fields:
    - **Description**
    - **Status**
4. To save the modifications, click **Save**.

Deleting REST integrations

You can only delete inactive REST integrations that are no longer used or needed.

To change the status of a REST integration entry, see Modifying an existing REST integration (on page 74).

To remove existing inactive REST integrations, complete the following steps:

1. Select **> REST**.
   The **REST** page appears.
2. Perform either of the following steps:
   - To delete a REST integration, select **>** succeeding the REST integration in the list.
   - To delete multiple REST integrations, select the checkboxes preceding the REST integrations, in the list, that you want to delete and click **Delete**.
3. A confirmation box appears. To proceed with the deletion, click **Ok**.

Chapter 8. Basic features

The basic features are features that are accessible at any time.

The list of basic features are as follows:

- Search
- Help
- Profile information

Search

Use the search feature to find artifacts like Journeys, Entry Sources, Data Definitions, or Folders. The Search is placed in the header bar and is accessible at any time irrespective of the menu you are using.

The Search function contains the following options:

Table 7. Search Options

Search Option	Description
Search in Folders	Searches for the entered pattern in the current folder of the active menu. For example, if the user is on **Entry Sources** menu and the current folder is `Files`, the option will search for entry sources matching the pattern in the `Files` folder.
Search in Journeys	Searches for Journeys matching the entered pattern.
Search in Entry Sources	Searches for Entry Sources matching the entered pattern.

Search Option	Description
Search in Data Definitions	Searches for Data Definitions matching the entered pattern.
Search in All	Searches for Journeys, Entry Sources, and Data Definitions matching the entered pattern. The search results will be displayed in different tabs: Journeys, Data Definitions, and Entry Sources.

Note: The order of the Search Options will change depending on the menu that is active.

Example

If you want to search a pattern `Mailer` and your current folder is `HolidayMailers`, you will see the following options:

```
Search in Folder 'HolidayMailers'
Search in Data Definitions
Search in Journeys
Search in Entry Sources
Search in All
```

Help

You can access Journey documentation at any time using the Help feature.

Click **Help** to access the Unica Journey User Guide. You can also access additional documentation from doc.unica.com.

Profile information

View the profile name that is currently logged in. The username of the logged in profile is displayed.

You can logout from Unica Journey by clicking the profile name and selecting **Signout**.

Chapter 9. Common features

Folders

Folders contain all the artifacts that you create. Artifacts include Journeys, Entry Sources, and Data Definitions.

You can access only the folders related to the active menu. For example, if you are viewing the Journeys menu and you access the Folders feature, you can only view folders containing Journeys. You cannot view the folders containing Entry Sources, or Data Definitions.

To access Folders, complete the following steps.

1. Select one of the following menus:
   - **Journeys**
   - **Entry Sources**
   - **Data Definitions**
2. Click **Folders**. The Folders panel appears.

You can perform the following operations on Folders.

Table 8. Folder Operations

Folder Operations	Reference
Create a folder	For more information, see Creating a folder *(on page 80)*.
Search a folder	For more information, see Searching a folder *(on page 80)*.
Edit a folder	For more information, see Editing a folder *(on page 81)*.
View folders	For more information, see Viewing a folder *(on page 81)*.

Folder Operations	Reference
View artifacts within a folder	For more information, see Viewing artifacts within a folder *(on page 82)*.
Move a folder or multiple folders to another folder	For more information, see Moving a folder or multiple folders *(on page 83)*.
Remove a folder or multiple folders	For more information, see Deleting a folder or multiple folders *(on page 84)*.

Creating a folder

Create a new folder to store artifacts like Journeys, Entry Sources, and Data Definitions.

You can organize the artifacts using folders. To create a new folder, complete the following steps.

1. Click **Folder**.
   The **Folders** panel appears.
2. Select **All Folders**.
3. Click **+ Folder**.
   A new folder appears.
4. Type a relevant name for the folder and click ⊘.

Searching a folder

Use the Search function to locate a folder. The Search function is extremely useful when you have a lot of folders.

To avoid scrolling through a long list of folders, use the Search function to locate a folder. To search a folder, complete the following steps.

1. Click **Folders**.
   The **Folders** panel appears.
2. Type the name of the folder you want to search in the Search Folder text box and select .
   The folder, or folders, matching the entered folder name appears. You can also search for a folder using a substring.

Editing a folder

When you edit a folder, you can only change the folder name.

To edit a folder, complete the following steps.

1. Click **Folders**.
   The **Folders** panel appears.
2. You can either search for the required folder or select **All Folders**. To search for the required folder, see Searching a folder *(on page 80)*.
3. Hover the cursor over the required folder and select .
4. Change the folder name and select .

Viewing a folder

Folders reside in the root folder or within another folder. There are multiple ways to access a folder.

All folders that you create reside in the root folder. The character "/" represents the root folder. To view a folder. or to view multiple folders, complete the following steps.

1. Click **Folders**.
   The **Folders** panel appears.

2. To view folders, perform one of the following steps.
   a. To view a specific folder, use the **Search Folder** function. For more information, see Searching a folder *(on page 80)*.
   b. To view all folders, select **All Folders**.
   c. To view folders that you access frequently, select **Frequently Used**.

Viewing artifacts within a folder

Folders can contain other folders or one of the following artifacts: Journeys, Entry Sources, or Data Definitions.

See Folders *(on page 79)*.

There are multiple ways to view the contents of a folder. To view the contents of a folder, complete the following steps.

1. Click **Folders**.
   The **Folders** panel appears.
2. For a quick view of folder details, perform the following steps.
   a. If the folder is a frequently accessed folder, select **Frequently Used**. You can also select **All Folders**.
   b. Hover the cursor over the required folder. You can view the number of folders and the number of artifacts within that folder.
3. For a detailed view of a folder, perform the following steps.
   a. If the folder is a frequently accessed folder, select **Frequently Used**. You can also select **All Folders**.
   b. Select to open the required folder.
   You will see two tabs: **Folders(n)** and **<Artifact>(n)**, where <Artifact> can either be Journeys, Entry Sources, or Data Definitions, depending on the menu you are accessing, and (n) is the number indicating the number of artifacts within the folder.

Example: A folder named `Example1` has two sub-folders: `Example1.1` and `Example1.2`. The `Example1` folder has three Journeys, and both `Example1.1` and `Example1.2` folders have two Journeys each.

If you open the folder `Example1`, you will see two tabs: **Folders(2)** and **Journeys(3)**.

If you open the folder `Example1.1`, you will see two tabs: **Folders(0)** and **Journeys(2)**.

If you open the folder `Example1.2`, you will see two tabs: **Folders(0)** and **Journeys(2)**.

4. To view the reports of the artifacts, perform the following steps.

    a. If the folder is a frequently accessed folder, select **Frequently Used**. You can also select **All Folders**.

    b. Select to open the required folder.

    c. Click **View <artifact name>**, where the artifact name can be Journeys, Entry Sources, or Data Definitions.
    The list appears in the respective menu page.

Moving a folder or multiple folders

All folders need not reside at the root (/) level. You can move some folders within other folders for better organization.

To move a single folder to another folder, or to move multiple folders to a different folder, complete the following steps.

1. Click **Folders**.
    The **Folders** panel appears.

2. Select **All Folders**.

3. You can move folders in either of the following ways.
    a. To move a single folder, you can either hover the cursor over the required folder and select , or select the checkbox preceding the required folder and click **Move to folder**.
    b. To move multiple folders, select the checkbox preceding the required folders and click **Move to folder**.
4. Select the required destination folder and click **Move here**.

Deleting a folder or multiple folders

Delete unwanted folders using the Delete operation. You can delete a single folder or delete multiple folders at a time.

The delete operation only removes a folder, if the folder does not contain any artifacts or sub-folders. If a folder contains artifacts or sub-folders, remove the artifacts and sub-folders first, before using the delete function.

To delete a folder or multiple sub-folders, complete the following steps:

1. Click **Folders**.
   The **Folders** panel appears.
2. Select **All Folders**.
3. You can delete folders in either of the following ways:
    a. To delete a single folder, you can either hover the cursor over the required folder and select , or select the checkbox preceding the required folder and click **Delete**.
    b. To delete multiple folders, select the checkbox preceding the required folders and click **Delete**.