Unica Journey V12.1.8 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 Journey. Journey is a part of Unica UI and is launched and managed within the same window like Campaign and other products. It is no longer launched in a separate screen.

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. There are two types of entry sources available in Journey to support input of audience data into Journey:

1. **File-based entry sources** - 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.
2. **Real-time entry sources** - Supports the following types of entry source:
    - **REST API 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.

            Note:

            Campaign sends data to Journey on the entry source. Data definitions which are specified in the process box are for marketer's use, making it easy to configure the data mapping as per the DD format.

            Campaign sends the data to entry source with the data format specified in data definition. Now, when data is pushed on entry source, then whichever Journey is using this entry source would start using this data and data will flow from all the journeys.

            There is no separation of data being send based on Entry Source + Data Definition - it's just sent the data on Entry Source. IF you need to keep the data separate - you would need to create separate entry source for separate journeys.

    - **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 into 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

Icon	Touchpoint	Description
	Salesforce	Performs CRM operations like add or update of contacts and leads using Unica Link.
	WhatsApp	Sends WhatsApp messages using Unica Deliver.
	AdTech	AdTech helps to sync audience from journey and campaign to the AdTech platforms like LinkedIn Facebook and Twitter.
	Mobile Push	Sends Mobile Push 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.
	Delay	Allows Journey designer to introduce a delay in execution for the Journey audience in a defined stage.

Orchestration Controls

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

Icon	Orchestration control name	Description
	Publish	Allows a designed Journey to output the Journey data to a flat file, a Kafka topic, or Entry Sources of type Kafka

Icon	Orchestration control name	Description
	Database	Enable orchestration with other system by inserting/updating database row or updating a raw SQL. This will be executed for every record in the Journey.
	Rest API	It helps to integrate any available REST API with 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:
     a. **Upload File** - CSV, TSV, JSON.
     b. **Real Time** - REST API, KAFKA, Unica Campaign, Unica Interact, Unica Discover

   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 72)*. 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 104)*.
          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.

     Example of REST API Entry Source

| POST ∨ | http://<Hostname>:<Port_no>/journey/api/thirdpartylogin | Send ∨ |

Params   Authorization ●   **Headers (9)**   Body ●   Pre-request Script   Tests   Settings   Cookies

Headers   👁 8 hidden

	Key	Value	Description	⋯ Bulk Edit Presets ∨
☑	Content-Type	application/json		
	Key	Value	Description	

| POST ∨ | http://<Hostname>:<Port_no>/journey/api/thirdpartylogin | Send ∨ |

Params   Authorization ●   Headers (9)   **Body ●**   Pre-request Script   Tests   Settings   Cookies

○ none   ○ form-data   ○ x-www-form-urlencoded   ● raw   ○ binary   ○ GraphQL   JSON ∨   Beautify

```
1  {
2  "clientId":"C09TRP4S4qFWMPHaetqM9MPokoynKxBg",
3  "clientSecret":"GHUS1rVPquFaFQR45JQ_YzO18SP6jE3C"
4  }
```

Body   Cookies (1)   Headers (9)   Test Results   🌐 Status: 200 OK   Time: 1034 ms   Size: 518 B   💾 Save as Example ⋯

| POST ∨ | http://<hostname>:<Port_No>/journey/api/entrysources/rest/data? | Send ∨ |

Params ●   Authorization ●   **Headers (10)**   Body ●   Pre-request Script   Tests   Settings   Cookies

Headers   👁 8 hidden

	Key	Value	Description	⋯ Bulk Edit Presets ∨
☑	Content-Type	application/json		
☑	Authorization	bearer Fmuf32aUhUa5LRmOcu831q3dtRhyD4qP		
	Key	Value	Description	

Body   Cookies (1)   Headers (14)   Test Results   🌐 Status: 422 Unprocessable Entity   Time: 1015 ms   Size: 522 B   💾 Save as Example ⋯

```
{

  "entrySourceCode": "ES-00000006",

  "data": [

  { "FirstName": "First_Name",

      "LastName": "Last_Name",

      "Email": "rahul@abc.com",

      "City":"Pune",

      "PhoneNumber":"+9196XXXXXX60",

      "Country":"IND",

      "DOB":"13/11/2001",

      "Product":"Buyone",

     "AccountNo":"10068"

   }

  ]

}
```

◦ **Kafka** - If you select this option, you will see a dedicated Kafka topic name on which you can post your data. By default, STREAMING_IMPORT is selected as Kafka topic name. New Kafka topic name can be added by clicking on the button. A new topic of the given name will be created on KAFKA. If for any reason (example server down) the topic is not created on Kafka, then an error message will be displayed saying Unable to create KAFKA topic ES creation fails. User will then have to choose a different name or retry after some time.

Note: When user wants to use multiple kafka brokers and they start their engine with single kafka broker, then topics by default get created on this single broker. Later, when user updates the broker list then kafka doesn't replicate the topics on other brokers because at the time of installation the replication value was set to one. Hence, during installation only, user needs to specify whether they want to use kafka with multiple brokers or with single broker.

Cluster Kafka:

Kafka Broker list: <BROKER_HOST1>:<PORT>, <BROKER_HOST2>:<PORT>, <BROKER_HOST3>:<PORT>

Information message on the broker list format.

What it shall do:

a. Update engine and web application properties with below parameter

spring.kafka.bootstrap-servers=<BROKER_HOST1>:<PORT>, <BROKER_HOST2>:<PORT>, <BROKER_HOST3>:<PORT>

b. JourneyEngine :

We added below property in journey_master_config.properties file in Journey Engine. Need to update from installer according to number of broker.

journey.kafka.replications = <Number of Brokers>

c. JourneyWeb :

We added below property in JounreyWeb/application.properties file in Journey web. Need to update from installer according to number of broker.

journey.kafka.customtopic.replications = <Number of Brokers>

Note: Internal kafka topic name cannot be used for creating the custom kafka topic ES. Once the topic name is configured and saved, then topic name cannot be edited. In case of deletion of Entry Source the underlying KAFKA topic will not be deleted.

User can integrate their choice of external sources without requesting an enhancement to Unica. They can build this integration with Journey by adding the plugin in CIF. Please refer the Unica Content Integration Developer Guide for more information.

Also, we ship integration with mailchimp out of the box, for more information on how to configure this integration, please refer Unica Content Integration Installation and Configuration Guide

Users can also add external entry source with the help of Sync external source button present next to the Kafka Topic Name.

a. Click on **Sync external entry source**

The **Add source** page appears.

b. Provide appropriate values for the following fields.

- **Select source repository** - Select repository from the dropdown of the field.
- **Select audience or event type** - Select audience or event type from the dropdown of the field.
- **Select Journey data definition** - click **Browse** and select the required data definition.

c. The **Field Mapping** dialog appears.

> **Note:** From V12.1.7 onwards, along with Entry source name Enty Source code is also available, which is clickable.

d. Map the Journey data definition fields with the appropriate source repository fields.

e. Click **Save & close**

Selected external source along with date and time appears on the create entry source page. Select the

icon for viewing external source details. Select the   icon for editing external source details.

Select the   icon to delete the selected entry source.

◦ **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.

◦ **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**.

> **Note:** For CSV and TSV type file entry source, the first row in file type entry source should be the data definition field names (with exact case and spelling as mentioned in corresponding data definition). It is not applicable for Json type file entry source.

> **Note:** Data passed in entry source in case of date fields (if the field is of datatype date in data definition to be used in Journeys) should match with the date format entered in data definition to avoid any inconsistencies in data processing.

Audience Ingestion Hints

The following section explains the use of audience ingestion hints for optimizing audience entries into Journeys configured with audience deduplication setting. If the Journey is configured for audience deduplication, Journey engine needs to look up every incoming audience record to decide if it is a new audience or an existing one. As per the lookup result, it either inserts a new audience record or performs deduplication on existing record. This approach has an overhead of consulting the audience database for every single incoming message. Consequently, this slows down audience ingestion process, which leads to delayed Journey processing. With the intention to optimize audience deduplication process, Journey engine supports certain hints, which can be supplied along with the audience message.

> **Note:** Following hints are ignored for the Journeys that have not been configured with deduplication setting. Furthermore, these hints are supported only for Kafka & REST entry sources.

Generally, the audience message for REST & Kafka entry sources would look like below JSON:

```
{
    "entrySourceCode": "ES-00000001",
    "entrySourceType": "KAFKA",
    "data": [
        {
            "email": "email1@domain.com",
            "mobile": "1122334455",
            "birthdate": "09 01 1985",
        },
        {
            "email": "email2@domain.com",
            "mobile": "5544332211",
            "birthdate": "01 09 1995",
        },
        {
            "email": "email3@domain.com",
            "mobile": "5566778899",
            "birthdate": "05 11 2000",
        }
    ]
}
```

This JSON can now carry an additional hint to convey existence of given audience(s). Based on the hint, Journey engine can skip the audience existence check, and directly go for new audience insertion or deduplication updates. Accordingly, above message can carry single hint common to all the audiences(3) included in the message.

For example,

```
{
    "entrySourceCode": "ES-00000001",

    "entrySourceType": "KAFKA",

    "__hints":{

        "action": "U" // I -> Insert, U -> Update

    },

    "data": [

        {

            "email": "email1@domain.com",

            "mobile": "1122334455",

            "birthdate": "09 01 1985",

        },

        {

            "email": "email2@domain.com",

            "mobile": "5544332211",

            "birthdate": "01 09 1995",

        },

        {

            "email": "email3@domain.com",

            "mobile": "5566778899",

            "birthdate": "05 11 2000",

        }

    ]

}
```

The ***action*** property inside the ___***hints*** object conveys the expected action for the audiences. The ***action*** property can take one the following values, and their impact is as mentioned below:

action property value	Impact on audience ingestion
I	Audience(s) will be considered completely new and will be blindly inserted into the audience database. **Caveat** – System will not check if the audiences are truly new or not. Hence, any erroneous hint may lead to the redundant record(s) of same audience if it is sent with "I" hint more than once.
U	Audience(s) will be deemed pre-existing, and system will update the existing records with newly received changes.

action property value	Impact on audience ingestion
	Caveat – System will not check if there is really any existing audiences based on the deduplication fields. If no such audiences are present, then the updates will have no impact. System will not convert updates into new audience insertions.
null or missing	If the property value is set to null and/or if the hint itself is missing, then Journey engine will consult audience database to see if incoming audiences already exist or not. Accordingly, it will perform either audience insertion or modification. In a nutshell, it will continue to run its normal course.

Like the common audience hint, above JSON message can alternatively carry separate hint for each audience. For example:

```
{
    "entrySourceCode": "ES-00000001",
    "entrySourceType": "KAFKA",
    "data": [
        {
            "__hints":{
                "action": "U" // I -> Insert, U -> Update
            },
            "email": "email1@domain.com",
            "mobile": "1122334455",
            "birthdate": "09 01 1985",
        },
        {
            "__hints":{
                "action": "I" // I -> Insert, U -> Update
            },
            "email": "email2@domain.com",
            "mobile": "5544332211",
            "birthdate": "01 09 1995",
        },
        {
            "email": "email3@domain.com",
            "mobile": "5566778899",
            "birthdate": "05 11 2000",
        }
```

```
    ]
}
```

The impact of this approach is exactly similar to the common hint approach explained earlier. For the above example, first audience will be modified with the new details, second will be inserted as a new audience, whereas for the third audience, Journey engine will first check its existence & work accordingly.

Additionally, combination of common & separate hints is also supported. For example,

```
{
    "entrySourceCode": "ES-00000001",
    "entrySourceType": "KAFKA",
    "__hints":{
        "action": "I" // I -> Insert, U -> Update
    },
    "data": [
        {
            "__hints":{
                "action": "U" // I -> Insert, U -> Update
            },
            "email": "email1@domain.com",
            "mobile": "1122334455",
            "birthdate": "09 01 1985",
        },
        {
            "email": "email2@domain.com",
            "mobile": "5544332211",
            "birthdate": "01 09 1995",
        },
        {
            "email": "email3@domain.com",
            "mobile": "5566778899",
            "birthdate": "05 11 2000",
        }
    ]
}
```

For the above example, common hint (I) will be applicable to the second & third audience records. Thereby, second & third audiences will be treated as new audiences & shall be inserted into the database. First audience however carries an overridden hint, accordingly to which Journey engine will perform deduplication update for it.

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

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
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 11)*.
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**.

Mailchimp Configuration

Configuration of Mailchimp as external source with Journey.

Navigate to **Unica Platform > Settings > Configuration**

From Configuration categories page navigate to **Journey > Integration > dataSources**

For Adding Journey datasource

1. Click **systemconfigurationTemplates**

   The **systemConfigurationTemplates** page appears.

2. Provide the below information:

   - **New category name**: <Journey>
   - **systemIdentifier**: Journey
   - **userCredentials**: Default user
   - **defaultUserCredentials** : asm_Admin
   - **dataSourceNameForCredentials** : <JOURNEY_DS_1>
   - **AdditionalParameters** :
   - **event-publisher-service.kafka.topics**: CIFINTEGRATION
   - **event-publisher-service.kafka.topics.CIFINTEGRATION.value.format**: Json

3. Click **Save**.

4. Expand the Journey node and click **httpGateway**

   The **Settings for 'httpGateway'** page appears.

5. Provide below information:

   baseUrl : http:<hostname>:<port>/journey

6. Click on **Kafka configuration** link and add below information

   Bootstrap servers (comma separated list of hosts) : <Kafkahost>:<port>

   e.g. <IP OR Hostname>:9092

For Adding Mailchimp datasource

1. Click **systemconfigurationTemplates**

   The **systemConfigurationTemplates** page appears.

2. Provide the below information:

- ◦ **New category name**: <Mailchimp>
- ◦ **systemIdentifier**: Mailchimp
- ◦ **userCredentials**: Default user
- ◦ **defaultUserCredentials** : asm_Admin
- ◦ **dataSourceNameForCredentials** : <Mailchimp_DS>

3. Click **Save**.
4. Expand the Mailchimp node and Click **httpGateway**

   The **Settings for 'httpGateway'** page appears.
5. Provide below information

   baseUrl : https://<MailchimpHostname>/<Version>/

   User needs to add these datasources in Journey. User need to gather below information:

   a. Journey Data Source UserId and password. Navigate to **Journey application > Settings > Rest** either create a new Rest Integration or use existing rest integration. Copy clientid and Client Secret.

   b. Mailchimp data source userid and password. Login to Mailchimp application and Navigate to **Profile > Extra > API keys**. Get the api keys and User column name will be user

   In mailchimp a/c **add Webhook** url as below:

   https://<AssetpickerHostname>:<Port>/asset-viewer/api/AssetPicker/webhook/Mailchimp/events/webhook_listener

   Navigate to **Platform Settings > Users**

   Click on **Required user** e.g. asm_Admin

   Click on **Edit dataSources link** and add below data sources

   Mailchimp_DS - user: <user> and password <API key>

   JOURNEY_DS_1 - user: <clientid> and password <Client Secret>

   Navigate to Unica Platform > Settings > configuration > Unica Platform > Security > API management > Unica Content Integration

   Click **API configuration template** and add below information
   - ◦ **New category name** : <Mailchimp>
   - ◦ **API URI** : /webhook/Mailchimp/events/*
   - ◦ **Require authentication for API access** - unselected

   Click **Save**

   After performing these steps Mailchimp will be added as external source in Journey.

   Note:

◦ If the user configures an external source in Journey, keep the following properties as `False`. This will allow the user to get the data from external source as per significant field configured in Journey data deduplication settings.

▪
```
<rule-enabled>false</rule-enabled>\<JourneyEngine>\conf\data-validation-rules.
xml
```

▪ In Platform, navigate to **Settings > Configuration > Journey > Journey Configuration** and set the value of the **Validation_On_Journey_Records** property to `False`.

◦ For configuring external source user must install Unica Content Integration component while installing or upgrading Unica Platform as a prerequisite.

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.

   Note: From V12.1.7 onwards, along with data definition name data definition code is also available, which is clickable.

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.

◦ **Masked data** - Indicates whether to mask the field information or not. If this box is checked, then the respective field details are masked. Box needs to be checked explicitly. None of the fields are checked by default. For old DD the fields are unchecked for masking.

> **Note:** A new feature Full Masking is introduced. Earlier, Unica Journey audience fields that are masked are displayed as * for any random characters. Currently, the audience fields that are masked displays the field values as * format but this is done partially and not in entire field value.
>
> With this feature, if the property **isFullmask** is set to true both web and engine `application.properties` file as `journey.isFullMask=true`. Complete masking for entire data that is displayed will be shown as *. Example - email address shown as - rahul@abc.com will be shown after masking as - *************.
>
> In case of isFullmask is set to false masking will be done partially as earlier.

◦ **Required**- Indicates if a field is mandatory to be passed into the Entry Source. For more information, see Data Definitions *(on page 25)*.

◦ **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**.

> **Note:** Journey supports all Java Date formats in data definition as free text field apart from the available options is dropdown.

> **Note:** Existing date formats available with space as delimiter, Journey data definition also support date formats with delimiter "/" , "." , " -"

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 27)*
- Modifying a Data Definition *(on page 28)*
- Moving Data Definitions to another Folder *(on page 28)*
- Deleting Data Definitions *(on page 28)*

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.

> **Note:**
> ◦ User can add new fields in Data Definition even if it is in use. Also, Journey allows adding new fields to Data Definitions even if the Data definition is in use.
> ◦ If a Data Definition is in use by a Journey, and if you add any extra fields to the Data Definition, to see the new data in a Published Kafka topic, Published CSV file, and Published Kafka Entry Source, pause and republish the Journey associated with the Data Definition.
> ◦ In Kafka entry source, if any external source is configured with any data definition, and if user wants to configure new data definition with the external source, then some mapping will be shown as configured. User needs to reconfigure these Journeys and CIF source mapping fields.
> ◦ Once an audience type is used for configuration, then it cannot be used again for other configurations. While configuring CIF if one audience type is used, then same audience type cannot be used again in the same entry source.

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 25)*.
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**.

Duplicating a Data Definition

You can either duplicate the Data Definition from the Data Definition listing page or from the Data Definition Edit page.

To create a duplicate of a data definition, complete the following steps:

1. On data definition listing page, hover over the required data definition and select ⋮ **>** ⧉ .
   The **Duplicate Data Definition** dialog appears.
2. Provide an appropriate name and click **Copy**.
3. You can duplicate data definition from the data definition edit page by clicking on the **Duplicate** button present at the top right side of the screen.

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 30)* - Create a Journey by selecting required Entry Sources and specifying the Data Definition to be used in Journey.
2. Design Journey *(on page 32)* - User Journey controls and touch points to design the Journey.
3. Define Journey Goals *(on page 73)* - Define Journey goals, which helps in evaluating marketing goals and completing the Journey.
4. Define Journey Settings *(on page 72)* - Define Journey settings for handling duplicate data entering the Journey.
5. Publish Journey *(on page 64)* - 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 64)* - You can pause a published Journey and edit it.
7. Edit a Journey *(on page 62)* - You can edit the paused Journey and re-publish it.
8. Mark Journey as Complete *(on page 65)* - 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 110)*.

> ✏ **Note:** From V12.1.7 onwards, along with entry source and data definition names, their codes are also available, which is clickable.

4. To add Regional contact preference, select the checkbox **Use Regional contact preference**. After checking the checkbox, the field **Timezone** will become **Select region (contact preference)**. Select the time zone preferences from the select region (contact preference) dropdown. Time zone preferences set from contact central will be available in this dropdown. While sending communications, Journey will check for the time preference defined and will proceed only when the send time falls within the selected time frame. If the send time does not fall within the selected time frame, then journey will go in waiting state and will wait for the next preferred time.

5. Select the required **Timezone**. If user want to use Journey Time zone without contact preference user can uncheck the option **Use regional contact preferences**
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.

> ✏ **Note:** Journey processes all responses received from HIP and Deliver in UTC time zone. Even if Journey receives responses in any other time zone than UTC, it will process them as per UTC time zone only. Hence, in such cases there can be time mismatch, which results response count mismatch on Goal historical and Goal analysis page.

6. Select an appropriate **Marketing Stage**. The available values are:
   - ◦ **Referral**
   - ◦ **Retention**
   - ◦ **Conversion**
   - ◦ **Activation**
   - ◦ **Acquisition**
   - ◦ **Awareness**

7. 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.

8. 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 11).

To create an Entry Source, see Creating Entry sources (on page 11).

> 📝 **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.

9. 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 25).

   To create a Data Definition, see Creating Data definitions (on page 25).

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

    You can add maximum 7 milestones to a Journey.

11. Click **Next**

    Milestone Details page appears.

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

12. 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.

13. 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 32)*.

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 32)*.
2. Configure a Journey control. For more information, see Journey controls *(on page 41)*.
3. Configure a Journey goal. For more information, see Journey Goals *(on page 73)*.

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 25).

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**
      ◦ **Twitter**
      ◦ **Mobile Push**

   Users can add Twitter connector via Link. For uploading audiences in twitter for advertising ability use existing list or create a new List. This is very similar to other ADTECH integrations. New touchpoint is not needed for this. Existing ADTECH type with new twitter connector will also be listed.

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

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 98)*

   d. To add global preference in touchpoint, while configuring touchpoint select the checkbox Follow Business hours and channel preferences (Defined in Platform). When the checkbox is checked, Journey will check for the time preference defined and will proceed only when the send time falls within the selected time frame. If the send time does not fall within the selected time frame, then journey will go in waiting state and will wait for the next preferred time. For Journey in waiting state when you hover on the touchpoint on Journey canvas screen, the popup displays waiting option. Click on the waiting option will display Waiting page. This page will display the following information: Date time , Reason, Entry Source Name along with data definition fields.

   Reasons column will display one of the below reasons for Journey to be in Waiting State:

- **INVALID_COMMUNICATION_TIME** - This wait reason is displayed when user try to send communication in non-communication hours define in contact central.
- **CAPACITY_NOT_AVAILABLE** - This wait reason is displayed when user try to send communication but all the capacity defined for the day/week in contact central is consumed.
- **GLOBAL_ID_NOT_MAPPED_WITH_CHANNEL** - This wait reason is displayed when user try to send communication from one of the channel (email, sms,whatsapp, push) but for that particular channel global preference is not set.
- **NA** - This wait reason is displayed when journey is waiting for response from contact central, once journey get the response and any of the above-mentioned reason come in response it will update to that response.

If user has set capacity for sending communication but no time preferences, then while sending communications Journey will check for the capacity available. If the capacity is available then communication will be send, else Journey will wait for the next available capacity.

Note:

- Time zone and channel preferences can be set for Email, SMS, WhatsApp and Mobile push touchpoints.
- From Journey version 12.1.3, if the Audience moves to waiting state due to invalid communication or insufficient capacity, the Audience would remain in waiting state till the next valid communication time or the next capacity setting is available in Contact Central. **Example**:
  - If capacity is exhausted, audiences will remain in waiting state. If user increases the capacity, new audience will proceed but old audiences will remain in waiting state. These audiences will proceed from the waiting state when next day/week's capacity is made available.
  - If audiences remains in waiting state due to invalid communication time, the audiences will proceed when the next valid communication time gets available.

Note: If API communication fails between Journey and Control center, audiences remain in waiting state on particular touchpoint in Journey and on state it will show waiting reason as API_NOT_AVAILABLE.

e. Click **Next**.

f. To create a Journey with Email touchpoint, see Configuring an Email Touchpoint *(on page 35)*.

g. To create a Journey with SMS touchpoint, see Configuring an SMS Touchpoint *(on page 37)*.

h. To create a Journey with Salesforce touchpoint, see Configuring a Salesforce Touchpoint *(on page 38)*.

i. To create a Journey with WhatsApp touchpoint, see Configuring a WhatsApp Touchpoint *(on page 39)*

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: If required we can delete touchpoints.

Understand how to use Journey controls. For more information, see Journey controls *(on page 41)*.

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 32)*.

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

If you have set a default email connection in Setting a default email connection *(on page 98)*, 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.

1. 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**.

2. 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.

> **Note:** Journey gives each user a unique id known as audience id. This id helps in tracking different ongoing events for a particular audience. It is not mandatory to map Journey audience id field on Link screen because Link understands the significance of audience id field and sends audience values for different audiences.

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**.

3. 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**.

> **Note:** Email touchpoint can be configured with delivery channels like Deliver or Link. While the Journey is in draft mode (not published earlier) user would not be able to change the delivery channels from Deliver to Link or vice versa. Once you configure one delivery channel you must not change it to another delivery channel. If there is need then user can remove the email touchpoint and configure it with new delivery channel.

Journey support unsubscribe events

Journey support Unsubscribe events in Journey through deliver. If a user wishes to unsubscribe from Journey emails, we will track them through unsubscribe. Email ids of users will be saved in table EmailUnsubscribedList and Journey will not send any mails to these users in future.

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 32)*.

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 98).

   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 32)*.

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 99)*.
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 32)*.

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**.

Configuring Mobile Push Touchpoint

Select Mobile Push touchpoint when you want to connect to the customer through mobile push messages. Mobile Push integrates with Unica Deliver, and from 12.1.7 onwards with Unica Link, so that you connect to the Unica Deliver execution engine or the Unica Link connector for sending mobile push.

Before you start this procedure, see Touchpoints *(on page 32)*.

To configure Mobile Push touchpoint, complete the following steps:

1. Double click on the Mobile Push touchpoint.

   The **Push Configuration** page appears.

2. Provide values for the following fields:

    ◦ **Name** - Mandatory.
    ◦ **Description** - Not Mandatory.

3. In the **Send mobile push using*** section, select either **Deliver** or **Link**.

4. Click **Next**.

    The **Select Application** page appears.

5. Perform the following steps only if you select the **Deliver** connection:

    a. Select the required application. You can use the Search bar to locate the required application.

    > **Note:** Application selection will not have any functional impact because application selection is handled by Deliver while creating Push Templates. While sending the notifications, the app selection for communication will be considered by Deliver selected while creating the deliver template.

    b. Click **Next**

    The **Select Template** page appears.

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

    d. Click **Next**.

    The **Mapping** page appears.

    e. Map the 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.

    > **Note:** XID param is mandatory field to Map PushId type field in Journey associated data definition for Mobile Push.

    f. Click **Save**.

6. Perform the following steps only if you select the **Link** connection:

    a. In the **All Connections (n)** panel, select one of the available connections (for Android or for iOS). You can also set a default connection or remove default connections. For details, see Setting a default PUSH connection *(on page 100)*. Click **Next**.
    A panel appears in which the **Properties Step 1** section is active.

    b. Provide values for the following fields:

Create Audience	Mandatory. Available options are `New` and `Existing`

Audience Name	Mandatory. If you select New for **Create Audience**, type an appropriate name. If you select Existing, select one of the available values.
Push Title	Optional. Type an appropriate name to identify the PUSH purpose.
Push Body	Optional. Provide a description about the purpose of the PUSH property.
Fetch Duration in Days	Provide the number of days in which the status has to be periodically fetched.

c. If required, toggle the Advanced Properties to activate it. When active, provide values for the following fields:

Push icon URL	Supported only for iOS (version 10+). Accepts only HTTPS URL.
Push Picture URL	Accepts only HTTPS URL. Only JPEG format is supported.
Push audio URL	Supported only for iOS (version 10+). Accepts only HTTPS URL.
Push video URL	Supported only for iOS (version 10+). Accepts only HTTPS URL.
Fetch Existing Template	Select a predefined Campaign template.
Time To Live	The time duration which the Batch tries to send PUSH to your device.
Deep Link URL	Provide a shortened redirect URLs to a specific location in the app for which the PUSH is being sent.

d. Click **Next**.

A panel appears in which the **Input Field Mapping Step 2** section is active.

e. Map the **Batch fields** with the appropriate **Journey Fields** (coming from the Data Definition associated with the Journey during Journey creation).

f. 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**
- **Loop start**
- **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 45)*.
2. To add an Engagement Split control, see Configuring an Engagement Split control *(on page 43)*.
3. To add a Join control, see Configuring a Join control *(on page 43)*.
4. To add a backward Loop control, see Looping in Journey *(on page 50)*.
5. To add a Delay control, see Configuring a Delay control *(on page 42)*.
6. To add a Publish control, see Configuring Publish *(on page 56)*.

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 30).

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 32)*.
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** or select the **Wait Till Date (By Data Definition Field)** and provide the appropriate values.

      Note: In Data Definition field if you have date as a required field then, delay control can be set on date.

d. If **Use Expression** checkbox is not checked then only **Select field** with dropdown is available. If the use expression checkbox is checked then along with **Select field** you can also select **Operator** and **No of days** for delay configuration.

e. Click **Done**.

Note: When a Journey is in delay and we update the delay duration then a warning message saying **The change in delay might affect all existing audiences to wait till new set date, are you sure you want to continue?** is displayed.

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 32)*.
2. Drag the added **Join** control from its source to the destination where you want the flow to merge.

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 32)*.
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.
   ◦ **push** - all Push Touchpoints above the **Engagement Split** control.
   ◦ **whatsapp** - all WhatsApp 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 98)*.

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

   c. For the `push` Touchpoint, select one of the following events:
      ▪ PUSH_SENT
      ▪ PUSH_DELIVERED
      ▪ PUSH_READ

   d. For the `whatsapp` Touchpoint, select one of the following events:
      ▪ **Sent**
      ▪ **Delivered**
      ▪ **Read**

▪ **Response**

For the **Response** event click the **+ Path button** to add new **Path name** and **Path values** that work as branches on Journey canvas.

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.

For Decision split, Engagement split and delay controls, values entered in the property Max No of days in Delay Evaluation Period governs both Duration and Wait Till date fields. This property is available in Platform configurations under Journey tab, **Journey > Journey_Configurations > Journey_Waittime_Configurations**. Wait days cannot be less than one. Value supported by duration and Wait till date fields cannot be more than the value set in property Max No of days in Delay/evaluation Period. For example, If the 50 days is set as the maximum wait days and user enters 50days and 20 hours then an error message is displayed. Once the **Duration** or **Wait till date** elapses, Journey will assume that there are no events generated for the selected Touchpoint.

8. Click **Done**.

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.

   Note: After changing the datatype of **Data definition** filed, user needs to re-select the datatype to reflect the relevant options in the dropdown of **Condition** filed.

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. Set one of the following evaluation periods for customers to wait for a condition to be satisfied:
   - Duration - Set the duration in days, hours, or minutes. By default, the minimum duration for Decision valuation period is 5 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 data that satisfies the configured condition the selected decision split and the audience in the Journey will move to the NO path.

Audiences satisfying the condition will be moved to Yes path immediately.

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

Note: When user input the date in Journey entry source and date - year is mentioned in two digits then Journey consider this year in the current century, for example if you send the date as in format DD/MM/YY - 10/12/22 - then year is considered as 2022. If you need to send any date for processing Journey from previous century - for example - 04/031982 - then it needs to be explicitly specified in YYYY format.

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.

Decision Split supports custom macro building through expression builder

A complex expression builder allows users to create complex expressions by combining simple expressions and functions. The enhanced expression builder is designed to help the user to create complex custom expressions easily. The Expression builder will allow the user to design the matching criteria for the Decision split. It can be used to build a simple to complex nested set of criteria. Some quick wins when you use expression builders may be:

- Calculations on data: Use complex expressions to filter a dataset to only include where the value of a certain column is greater than a certain value.
- Calculations on numeric, date data: Use complex expressions to calculate the greater than the value of a column or to identify the different age values in a column.
- Calculations over boolean and string data: Use complex expressions to find and execute the journey path only if the name from a column that contains a specific keyword like JOE is available.

Following are the supported expressions and data types that expression builder supports:

Numeric	Date	String	Boolean
◦ GREATER_THAN ◦ LESS_THAN ◦ IN ◦ NOT_IN ◦ EQUALS ◦ NOT_EQUALS	◦ GREATER_THAN ◦ LESS_THAN ◦ IN ◦ EQUALS ◦ NOT_EQUALS ◦ IS_NULL	◦ IN ◦ NOT_IN ◦ EQUALS ◦ NOT_EQUALS ◦ IS_NULL ◦ IS_NOT_NULL	◦ IF

Numeric	Date	String	Boolean

◦ IS_NULL
◦ IS_NOT_NULL
◦ GREATER_-
  THAN_EQUALS
◦ LESS_THAN_E-
  QUALS
◦ TO_NUMBER
◦ TO_STRING
◦ NOT_BETWEEN
◦ BETWEEN
◦ MULT
◦ SUBSTRACT
◦ DIVIDE
◦ SUM
	◦ IS_NOT_NULL
	◦ GREATER_-
	  THAN_EQUALS
	◦ LESS_THAN_E-
	  QUALS
	◦ TO_DATE
	◦ DATEDD
	◦ CURRENT_DATE
	◦ DATE_FORMAT
	◦ DATE_PARSE
	◦ DATE_DAYDIFF
	◦ CURRENT_DAY
	◦ CURRENT_-
	  MONTH
	◦ CURRENT_YEAR
	◦ CURRENT_WEEK
	◦ CURRENT_DAY-
	  OFTHEWEEK
		◦ TO_NUMBER
		◦ STRING_UPPER
		◦ STARTS_WITH
		◦ ENDS_WITH
		◦ STRING_CON-
		  TAINS
		◦ TO_STRING
		◦ STRING_LENGTH
		◦ STRING_CONCAT
		◦ STRING_LOCATE
		◦ STRING_SUBSTR
		◦ STRING_LOWER
		◦ STRING_RE-
		  PLACE	

User can find/access expression builder on Decision Split screen. Select Expression Builder option from **Field** dropdown.

Expression Builder page appears. Set the required values in the respective fields and click on **Save**.
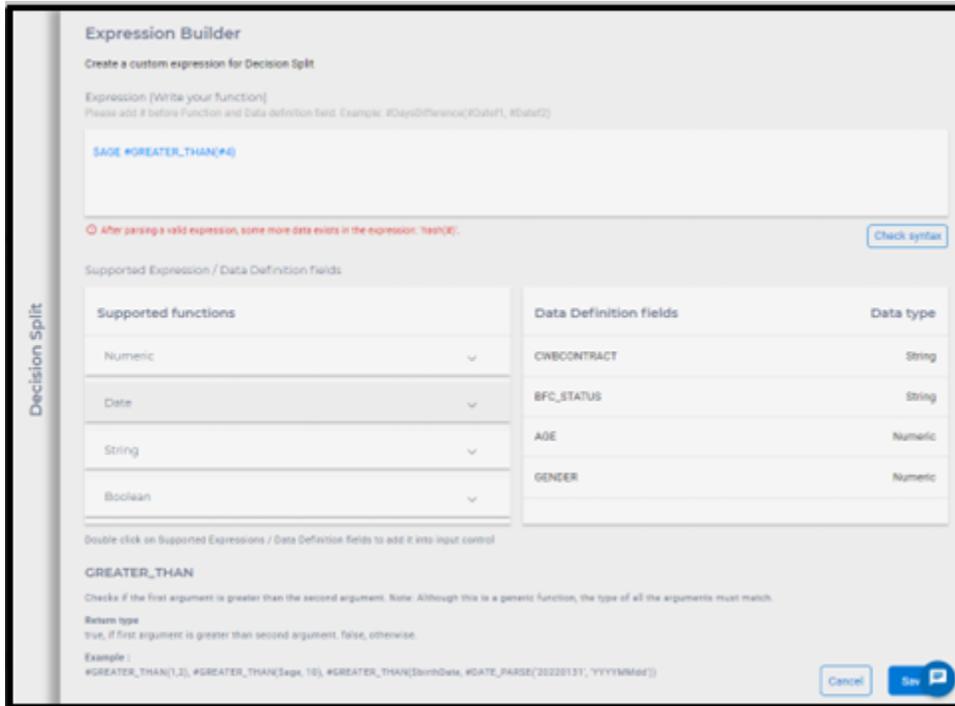
Looping in Journey

Looping is a new feature introduced in Unica Journey 12.1.5. It is part of Journey controls and you can use it to loop parts of a user Journey for a specified number of times.

In the earlier versions, you could create a Journey that could only have a unidirectional flow from Journey start node to the Journey end node. You could not create a Journey flow that could move the flow back to a previous operation or operations to repeat it. For example, if you have configured an Email Touchpoint and an SMS Touchpoint, and if you wanted to send reminders to the same audience via email and SMS, you had to add an additional touch points for reminders.

Looping gives you the flexibility to loop Touchpoints or Orchestrations, added to the Journey, for a specified number of times.

Note: Currently, you can create a loop of only nine iterations or lesser.

Configuring a Loop start control

To add a Loop start control to the Journey flow and to configure it, complete the following steps

Some conditions related to usage of Loop start control are as follows:

- In case of Touchpoints or Orchestration, Loop start control will work with Deliver Touchpoints.
- Looping does not work on any Link Touchpoints.

- You can create a loop with up to nine iterations. In the Loop Count field you can add numbers from 1 to 9. The system does not accept the value 0. Since Journey processes at least one pass even without a loop, it becomes redundant if you add 1 for Loop Count. The best practice is to add a number between 2 and 9.
- The Loop end node must be cyclic and must not be kept dangling. You cannot save a Journey with a dangling Loop end node.
- If you add Delay controls in the Loop, and if you hover the mouse on these controls, the system will not show iteration-wise counts.
- If you add Publish controls in the Loop, and if you hover the mouse on these controls, it will not show iteration-wise counts. As this control is added in loop, if loop iterates five time for single audience, five entries will be added in Publish CSV file or Kafka topic or Publish Kafka Entry source.
- You can add more than one loop in a Journey but ensure that different loops do not share the same Touchpoints or Orchestrations.
- If a Loop Count includes a Decision Split or an Engagement Split, the count value after adding the Yes and No branch is more than the number of audiences. For details, see Decision Split or Engagement Split Statistics *(on page 55)*.

1. Implement one of the following steps:
   a. Create a new Journey with the appropriate Entry Source and Data Definitions. Design the Journey with the required Touchpoints, Orchestrations, Goals, etc.
   b. Access an existing Journey that is either in Published or Draft status
2. For the newly created Journey or in an existing Journey, open the Journey canvas.
3. From the Palette drag the **Loop start control**, from the **Journey control** section, and drop it below the Touchpoint or Orchestration where you want the loop to end.

   Example:
   - If you just want to loop a single Touchpoint or Orchestration, place the Loop start control below the Touchpoint or Orchestration that you wish to loop. This point is called Loop start.
   - If you want to loop multiple Touchpoints or Orchestrations, place the Loop start control below the last Touchpoint or Orchestration that you wish to include in the loop. This point is called Loop start.

4. 📝 **Note:** This is mandatory step and is needed even if you want to save a Journey in Draft mode.

   On the Journey canvas, drag the Loop end node and connect it to where you want the loop to begin.

   Example:
   - If you just want to loop a single Touchpoint or Orchestration drag and connect the Loop end node above the Touchpoint or Orchestration that you wish to loop. This point is called Loop end.
   - If you want to loop multiple Touchpoints or Orchestrations, drag and connect the Loop end node above Touchpoint or Orchestration that you wish to include in the loop. This point is called Loop end.

5. Double-click the Loop start node.

   The **Looping Parameter** panel opens.
6. In the **Looping Parameter** panel, Provide the following values:
   a. **Name** - The name to identify the Loop control.
   b. **Description** - Optional. A description for the Loop control.

c. **Loop Count** - The number of times the looping iterations must be performed. This field does not accept a value less than one or greater than nine.

d. Click **Save**.

7. Save the Journey and Publish it.

8. Upon successful Publish of the Journey, hover the mouse over the Touchpoints or Orchestrations within the loop and you will see some statistics. Click **Loop details** for additional details. See Statistics generated by Looping *(on page 52)*.

9. Hover the mouse over the repeat/Loop start node to see statistics related to audiences. See Statistics generated by Looping *(on page 52)*.

10. You can also see the summarized statistics in the **Performance** tab. From the Journey canvas, access the **Performance** tab.

The Performance page appears. For an understanding of Looping performance with an example, see Looping Performance Statistics *(on page 54)*.

Statistics generated by Looping

Looping Statistics are similar to Journey statistics but it contains additional information related to Iterations. Looping statistics are added not only to the Touchpoint or Orchestration but also to the Looping/repeat node in the Journey Canvas.

Touchpoint or Orchestration Statistics

In this example, we will use an Email Touchpoint that has 5 Iterations.

Hover the mouse over the Email Touchpoint within a Loop. You will see a callout with Journey statistics.

⚠️ **Important:**

- Even though the Touchpoint or Orchestration resides within a loop, the statistics displayed are only for the first iteration and not the combined value after all iterations. Select the value for any statistic, which opens a panel, and you will see the values for all parameters and values in each iteration. For example, if an Email Touchpoint resides in a loop, if you hover over the touchpoint, you may see a value like `Sent: 5`. The value 5 represents the 5 sent emails in Iteration 1. Select the value 5 to see values for the other iterations.
- When editing a Journey, if you delete the Loop control, and if the Loop control has already performed some loops, the statistics for the Touchpoint or Orchestration shows the consolidated statistics count of all the iterations.

Within the callout, select **Loop details**. The Loop data panel appears. The data in the panels appears as follows:

Columns I1 to I5 are Iteration 1 to Iteration 5. In this example,

we are assuming an audience of 50 entered the Journey.

Loops	I1	I2	I3	I4	I5
Open	30	25	35	20	15
Link Click	25	20	10	5	9
Bounce Soft	5	5	5	5	5
Bounce Hard	5	5	2	5	5
Sent	50	50	50	50	50
Error	5	5	3	5	5
Unsubscribe	0	0	0	0	0
ISP Feedback	5	5	5	5	5
Landing Page	10	10	10	10	10

Note: If you edit journey design and reduce the loop count, the stats panel will show maximum available iterations. **Example**: If you initially configure a Loop for six iterations, which processes some audiences, and after some time you pause the Journey and modify the looping count to three iterations, the statistics panel shows 6 iterations (maximum), but the new entering audiences will be repeated as per new iteration which is set to three.

Let us look at some scenarios with examples.

Scenario 1:

Columns I1 to I5 are Iteration 1 to Iteration 5.

Loops	I1	I2	I3	I4	I5
Sent	50	50	50	50	50

In this case there are 50 audiences in each Iteration. The number 50 indicates that the mailer was sent to all 50 audiences.

Scenario 2:

Columns I1 to I5 are Iteration 1 to Iteration 5. We are assuming an audience limit of 50.

Loops	I1	I2	I3	I4	I5
Open	30	25	35	20	15

In this scenario, there are 30, 25, 35, 20, and 15 audiences who opened the mailer in that specific Iteration.

When you click the value in each iteration, you will see a panel with audience details for that iteration. The fields are not fixed in this panel as it is dependent on the data definition set for the Journey. It may be possible that an audience in one iteration might also be present in other iterations or all iterations. Additionally, in this panel, there is a field named **Accepted On**. The value of this field will be the Timestamp at which the audience entered the Journey. This timestamp value will remain fixed and not change as per iteration.

Example: If an audience with email ID jane.doe@example.com entered the Journey at `25/12/2022 09:00 AM`, and if this audience is part of a Loop, the **Accepted On** value for this audience will remain the same in each iteration.

Scenario 3:

Columns I1 to I5 are Iteration 1 to Iteration 5. We are assuming an audience limit of 50.

Loops	I1	I2	I3	I4	I5
Link Click	25	20	10	5	9

In this scenario, there are 25, 20, 10, 5, and 9 audiences who clicked the link in the mailer, for that specific Iteration.

Looping Statistics for Audiences

In the following example we will assume that Journey processed an audience of 10 and the number of iteration are five.

Hover the mouse over the repeat/Loop start node to see statistics related to audiences. Click **Loop details** and a panel opens with the following details:

Loops	I2	I3	I4	I5
Audience pass through loop	0	5	3	2

Audience loop panel will not list Iteration 1 because by default, the Journey performs at least one iteration without looping. In the earlier mentioned example, you will see that

- Iteration 2 has a value 0 because all 10 audiences have completed two iterations.
- Iteration 3 has a value 5 because 5 out of the 10 audiences have completed only three iterations.
- Iteration 4 has a value 3 because 3 out of 10 audiences have completed four iterations.
- Iteration 5 has a value 2 because 2 out of 10 audiences have completed five iterations.

Looping Performance Statistics

When you access the **Performance** tab of a Journey with Looping control, you will see statistics of the Touchpoints or Orchestration added.

Scenario:

As an example, we will assume that the Journey processed five audiences and the looping contained an email touchpoint with three iterations. The **Email Performance** section will have the following Performance statistics:

- Delivery
- Opens
- Clicks
- Average Interaction Time

Delivery	Total Delivered: 15	Total Sent: 15	This indicates that Journey sent 15 emails and all 15 were delivered (for five audiences with three iterations)
Opens	Unique Opens: 5	Total Sent: 15	This indicates that Journey sent 15 emails and five of the 15 emails were opened by the audience (for five audiences with three iterations). If an audience opens the same email twice, it will not be counted.
Clicks	Unique Clicks: 10	Total Sent: 15	If Journey sends 15 emails and each email had 2 links, the total number of links were 30. If the audiences who opened the 5 emails in previous row (Unique Opens: 5) clicked both the links in the email the number of Unique Clicks becomes 10.

These numbers are also applicable when setting Goals for Journey. Instead of setting the Goals based on audiences, for Journeys containing loops, if required, you can set goals based on the numbers generated in performance.

Decision Split or Engagement Split Statistics

In a Journey, if a Decision Split or an Engagement Split is part of Looping control there are certain statistics which will be different from a Journey that does not have looping. Let us understand it with an example.

Example:

In a Journey, containing an Engagement Split, where the condition is defined that if an audience opens the email, we move them to one flow and those who do not open the email we move them to another flow. In this case, if there are 10 audiences and 5 of them open the mailer and 5 do not, then the callout would show 10 for engagement split and 5 for each branch.

But for the same scenario, if we introduce a looping control and a delay, where if an audience does not open the email we add a delay of 48 hours and add a Loop count of 3, the numbers will be as follows:

- First Iteration → `Engagement Split = 10 | Open Email branch = 5 | Not Opened Email branch = 5.`
- For the Not Opened Email branch, wait for 48 hours before sending the second iteration mailer. After sending the mailer, 3 audiences open the email.
- Second Iteration → `Engagement Split = 10 | Open Email branch = 8 | Not Opened Email branch = 5.`
- In the second iteration the Open Email branch has 8 because in the first iteration 5 audiences had opened the mailer and in the second iteration 3 more opened the mailer, making the total eight. For the Not Opened Email branch, the value is still 5 because the audiences entering the branch are the same audiences.
- After the second iteration, the Not Opened Email branch waits for 48 hours before sending the third iteration mailer. After sending the mailer, the remaining 2 audiences open the email.
- Third Iteration → `Engagement Split = 10 | Open Email branch = 10 | Not Opened Email branch = 5.`

Orchestration

Journey Orchestration deals with the actions to be performed for sharing Journey data with other applications. .

Journey Orchestration contain the following actions:

- **Publish**
- **Database**
- **Rest API**

To configure Journey Orchestration, complete the following steps:

1. To configure Publish, see Configuring Publish *(on page 56)*.
2. To configure Database, see Configuring a Database *(on page 58)* .
3. To configure Rest API, see Configuring Rest API *(on page 58)*

Configuring Publish

Use the Publish orchestration 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.

To configure a Publish control, complete the following steps:

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`.

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 (-).

> **Note:** When user wants to use multiple kafka brokers and they start their engine with single kafka broker, then topics by default get created on this single broker. Later, when user updates the broker list then kafka doesn't replicate the topics on other brokers because at the time of installation the replication value was set to one.
>
> Hence, during installation only, user needs to specify whether they want to use kafka with multiple brokers or with single broker.

4. **Add Offers** - Check the checkbox **I want to associate Offers to this touchpoint**
   Select Offers button will get enabled.
5. Click on **Select Offers.**
6. The Offers screen from Centralized Offer Management appears. User can select one or multiple offers from the list of offers displayed or double click on the offer to select from the offer variant.
7. From **Select Channel of communication** dropdown, select the required communication channel.
8. Click on **Done**.

> **Note:** CH will be updated for orchestration point as soon as the record is outputted into and treatment code can be generated with same attribute.

> **Note:** On Publish Touchpoint, Select Offers button will be enabled only when user sets the partition setting for the Journey.

> **Note:** User is only able to configure Offer with Publish Touchpoint with CSV and Kafka Topic. User is not able configure Publish Touchpoint with Kafka Entry source.

Configuring a Database

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

To configure a Database, 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. **Add Offers** - Check the checkbox **I want to associate Offers to this touchpoint**
   Select Offers button will get enabled.
4. Click on **Select Offers.**
5. The Offers screen from Centralized Offer Management appears. User can select one or multiple offers from the list of offers displayed or double click on the offer to select from the offer variant.

   > **Note:** On Database Touchpoint, **Select Offers** button will be enabled only when user sets the partition setting for the Journey

6. From **Select Channel of communication** dropdown, select the required communication channel.
7. Click **Next**.
   The **Create New Action** page appears.
8. Default database connection is reflected in the Existing Connection field. Also, the defined properties of the database are reflected in the respective property fields. Select the required connection from the available connections.
9. Click **Next**.
   The **Field Mapping** page appears.
10. Map the **Database Fields** with **Journey Fields**.
11. Click **Save**.

Configuring Rest API

Use Rest API Orchestration to send Journey fields as payload to other application.

To configure Rest API, complete the following steps:

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

- ◦ **Name** - Mandatory
- ◦ **Description** - Optional
- ◦ **Rest URL** - Provide an API on which you want to receive the data
- ◦ **API Details** - Select the API method and the authentication mechanism. There are three API methods:
    - ▪ **GET** – It is used to fetch the data from destination endpoint configured in rest URL
    - ▪ **POST** - It is used to publish the data.
    - ▪ **PUT** - It is used for publish/update the records.

    There are four Authentication mechanism - **Basic, API Key, Oauth** and **None**

Based on the selected API method and Authentication mechanism following fields appears:

If you select **Basic** Authentication mechanism, then section **Enter Credentials to authenticate** appears with fields User name and Password.

If you select **API Key** Authentication mechanism, then section **Enter Credentials to authenticate** appears with fields Key Name and Key Value.

If you select **Oauth** Authentication mechanism, then section **Enter Credentials to authenticate** appears with fields Username, Password, Client ID, Client Secret and Token URL.

If you select **None** Authentication mechanism, no authorization details required.

3. Click **Next**.

   The **Request Payload** page appears.
4. Select the Rest API type from **JSON** or **XML** and add payload. Click on **Sample Payload** for reference.

   > **Note: Request Payload** screen is available for **POST** and **PUT** API methods. For **GET** the fields remain disabled.

5. Click **Next**.

   The **Response Fields Mapping** page appears.
6. Select **JourneyFields** from the dropdown and in the **Response Fields** mention the response received from the destination system.

   > **Note:** Response Mapping is mandatory for GET API Method but not for POST and PUT API methods.

   Responses are grouped in five classes:
      a. Informational responses (100–199)
      b. Successful responses (200–299)
      c. Redirects (300–399)
      d. Client errors (400–499)
      e. Server errors (500–599)
7. **Add Offers** - Check the checkbox **I want to associate Offers to this touchpoint**

   Select Offers button will get enabled.

8. Click on **Select Offers.**
9. The Offers screen from Centralized Offer Management appears. User can select one or multiple offers from the list of offers displayed or double click on the offer to select from the offer variant.
10. From **Select Channel of communication** dropdown, select the required communication channel.
11. Click **Save**

    Rest API will be configured and saved in Journey

    On Rest API, **Select Offers** button will be enabled only when user sets the partition setting for the Journey. CH will be updated for Rest point as soon as the record is outputted into and treatment code can be generated with same attributes.

    From V12.1.7 onwards, following enhancements are available in Rest touchpoint functionality:
    ◦ Provision to specify one or more custom- headers.
    ◦ Provision to specify one or more request parameters.
    ◦ Provision to specify custom location for trust store and key store while connecting to secure web site via rest touch point i.e. using https.

    Custom Headers

    Certain rest APIs might require client applications to pass application specific headers while using the API. This section provides an ability to add one or more application specific custom headers. A header can have a static or a dynamic value. In case of dynamic value, user should specify the data definition field name in the form <<fieldname>> in the field **Value**. e.g. <<name>>, <<mobile>> etc. The placefolder will be replaced at runtime by the corresponding audience data.

    In case of multi valued header, it is recommended to specify it multiple times with different values.

    e.g.

    header name , header value

    city Mumbai

    city Pune

    However, the above recommendation might vary based on the logic to parse the header value in 3rd party rest API. If certain Rest API requires multiple values to be passed as say city=Mumbai|Pune, then the Journey designer will have to specify the same accordingly.

    header name , header value

    city Mumbai|Pune

    In such case , the Journey application will consider this as a single valued header and pass the same to the Rest API. Hence, the journey designer should refer the documentation of the Rest API to be used in Rest touchpoint.

Parameters

Certain Rest APIs might require client applications to pass application specific request parameters while using the API. This section provides an ability to add one of more application specific request parameters. A request parameter can have a static or a dynamic value.

In case of dynamic value, user should specify the data definition field name in the form <<fieldname>> in the field Value. e.g. <<name>>, <<mobile>> etc. The placefolder will be replaced at runtime by the corresponding audience data.

In case of multi valued parameter, it is recommended to specify it multiple times with different values e.g.

parameter name , parameter value

city Mumbai

city Pune

However, the above recommendation might vary based on the logic to parse the parameter value in 3rd party rest API. If certain rest API requires multiple values to be passed as say city=Mumbai|Pune, then the journey designer will have to specify the same accordingly.

parameter name , parameter value

city Mumbai|Pune

In such case , the Journey application will consider this as a single valued parameter and pass the same to the rest API. Hence, the journey designer should refer the documentation of the Rest API to be used in rest touch point.

> **Note:** The url string can directly be modified to add/modify parameters.

> **Note:** To Populate CH using Publish or Rest TP Link should be configured on the respective partition.

Dynamic variable/Data definition field in URL

A URL can also contain the place folder for data definition field e.g. http://employeemanagementsystem.com//<<EmployeeName>>/details

where EmployeeName is a field in the data definition. At run time, journey engine replaces this place holder with actual EmployeeName for each audience

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 30)*.
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.

Save as template

User can save a Journey as template and create a new Journey from the saved templates. To save a template, complete the following steps:

1. For a Journey, on the Journey canvas screen, click **More Actions > Save as template**.
   The **Save this journey as a template?** dialog appears.
2. Provide a name to the new template.
3. Click on **Save**

   Saved template will be available under Templates page. For more information, see Journey Template (on page 87)

Duplicating a Journey

User can also duplicate Journeys from the Journey listing page. For more information, see Duplicating a Journey (on page 71).

User 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.

Exporting a Journey

This functionality helps in deploying Journey from one instance to another. User can export Journey in any state (Published, Draft, Paused, or Completed).

To export a Journey, complete the following steps:

For a Journey, on the Journey canvas screen, click **More Actions > Export Journey.**
crc file and zip file will get downloaded.

Note: If user has Journey with CRM touchpoint configured and has goals configured on it. When Journey is exported in target system, CRM touchpoint needs to be configured again in target system to access edit goal page without any error.

You can also Export Journeys from the Journey listing page. For more information, see Export Journey (on page 70)

Deleting a Journey

You can also delete a Journey from the Journey listing page. For more information, see Deleting Journeys (on page 71).

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 ![icon] **> Published**.
2. Select a Journey for modification. For more information, see Modifying the details of a Journey *(on page 70)*.

   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.

Stop/Pause the journey for Audiences

On the journey canvas, a new control 'stop audiences' is introduced that allows the user to create a new rule to stop certain audiences matching the rule. User can view the existing rules in the paginated grid. Each row on the rules listing page contains the following details.

- Rule name
- Rule description
- Contacts counted
- Contacts actually paused
- Created by
- Created on
- Executed by
- Executed on
- Controls to modify, delete and execute the rule

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 73). 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 70)*.

    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

Note: From V12.1.7 onwards, columns **Data definition associated** and **Entry sources associated** will also display the code of the respective Data definition and Entry sources along with the names.

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
Code	Yes
Data definition associated	Yes
Description	No
Entry sources associated	Yes
Last modified on	Yes

Table 4. Fields in the Draft Tab (continued)

Field Name	Default Field?
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
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

Table 6. Fields in the Completed Tab (continued)

Field Name	Default Field?
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 66)*.
- For more information on fields in the Draft Journeys tab, see Table 4: Fields in the Draft Tab *(on page 66)*.
- For more information on fields in the Paused Journeys tab, see Table 5: Fields in the Paused Tab *(on page 67)*.
- For more information on fields in the Completed Journeys tab, see Table 6: Fields in the Completed Tab *(on page 67)*.

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.

> **Note:** From V12.1.7 onwards, if you check **Data definition associated** and **Entry sources associated** option then along with the the names their codes are also available, which is clickable.

Import Journey

You can Import Journey from Journey listing page.

To Import a Journey, complete the following steps:

1. Click on **Import Journey**

   The search window appears.

2. Select the required **crc** and **zip** file to be imported from the system.

   > **Note:** If user selects only zip file or only crc file then on Open an error message is displayed saying **Select at least 2 files two proceed** .

3. Click on **Open**

   Journey file imported successfully.

   Once the Journey is imported a popup is invoked saying **Journey imported successfully**. The popup displays **Journey Name** and **Location**. Click on **View Journey** button to see the imported Journey. Imported Journey appears on the Journey listing page under Draft Journey.

4. On every import, following details will get copied from source Journey into target Journey:
   - Entry Source same as source system will get created with new entry source code.
   - Data definition same as source system will get created with new data definition code.

   - Journey - Folder structure, Journey details like name, description will be copied. For All Link and Deliver touchpoints – Name and description will get copied but touchpoints will remain unconfigured as the Link instance can be different on target environment. Email template will not be assigned for Deliver respectively.

   - Engagement split - All details will be copied, except for Link click dropdown in case of Deliver since template will not be assigned to Deliver touchpoint after import.
   - Journey Milestones will get copied. Entry Source associated with each milestone will be copied along with the milestone conditions.
   - All Journey Goals will get copied. In case of Deliver, Link click dropdown will not be copied.
   - Journey De Duplication settings will get copied as it is.

     > **Note:** Offer Integration settings or partition settings will not get copied

   - Only one Journey can be exported at a time. However, same exported file can be used to import journey multiple times in target system. (This would again create entry sources and data definition each time journey is imported)

   > **Note:** If user has Journey with CRM touchpoint configured and has goals configured on it. When Journey is imported in target system, CRM touchpoint needs to be configured again in target system to access edit goal page without any error.

   > **Note:** For importing Journey, user need to have permission of creating Journey.

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 62).

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 30)*.
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**.

Export Journey

You can Export Journeys from the Journey listing page. User can export Journey in any state (Published, Draft, Paused, or Completed).

To Export a Journey, complete the following steps:

Hover the cursor over the required Journey and select ⋮ > ↗ crc file and zip file will get downloaded.

You can also Export Journeys from the Journey Canvas screen. For more information, see #unique_31_Connect_42_ul_sdk_jcq_2mb (on page 62)Exporting a Journey (on page 63)

Deleting Journeys

To delete a Journey, or multiple Journeys, you have to access the Journey listing page.

From V12.1.7 onwards, completed journeys can be deleted in addition to draft journeys. To delete a paused or published journey, user needs to first mark the journey as complete. When user click on the option to change the Journey state to complete, a confirmation alert is displayed. The alert message says that marking the journey as completed doesn't execute the journey or process any data, it solely changes the status of the journey. Once the journey is marked as complete, user can select that journey and delete it.

If user consents to delete operation on UI, system will permanently delete journey from Journey application immediately and other associated data will get deleted from Journey system database tables based on cleanup.audience.enable=true/false settings in engine application.properties file. Please check chapter **Clean-up Journey Audiences** in Journey admin guide for more information.

You can also delete Journeys from inside the Journey canvas. For more information, see Deleting a Journey (on page 63).

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 25)* 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 25)*.

     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 Records Validation

When records enter a Journey, users can set validation on the records.

When the **Validations_On_Journey_Records** property is set to `Yes`, the validation is performed on Email format, Data type on required fields, and minimum and maximum length of Data Definition for the required fields.

By default, the **Validations_On_Journey_Records** property is set to `Yes`.

This property can be handled from Platform side under Platform Configuration. You can navigate under Platform configuration settings: Settings for `Affinium|Journey|Journey_Configurations`.

Validations_On_Journey_Records: This flag defines whether to run validation on Journey records.

Possible values: `Yes` / `No`.

> ✏️ **Note:**
>
> - If the **Validations_On_Journey_Records** property is set to `No`, and the user adds some fields in data deduplication setting, the empty and `NULL` data will not be accepted for data deduplication fields.
> - After setting the flag, you must log out from Platform and Journey and log back in to both applications for the changes to reflect.
> - For any reason, if the **Validations_On_Journey_Records** property is not accessible in Journey from Platform, you can alternatively set the `journey.journeyrecords.validationrules` property in the `application.properties` file from Journey web.

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
- For Push - Supports Push sent , push delivered and Push read events

Note: 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 touch-

	point 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:** You can view Goals' historical performance and can also edit goals. Data is recorded in the Journey time zone (TZ string).

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 • Waiting • Stopped
SMS	Journey provides the following statistics for the SMS Touchpoint • Sent • Delivered • Link Click • Error • Waiting • Stopped
Salesforce	Journey provides the following statistics for the SMS Touchpoint • Success • Failure

Touchpoint	Statistics provided
	• Waiting • Stopped
WhatsApp	Journey provides the following statistics for the Whats-App Touchpoint • Sent • Delivered • Error • Read • Waiting • Stopped
Push	Journeyprovides the following statistics for • Sent • Delivered • Read • Failed • Waiting • Stopped

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 Accepted count to view Accepted Contacts details. The screen will display the following information, Accepted On, CustomerID, FirstName, LastName, Email etc. Click on Rejected count to view Rejected Contacts details. The screen will display the following information, Rejected On, Reason, FirstName, LastName, Email etc.

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 112)*.
2. To add or remove columns from the listing page, see Adding or removing listed columns in Journeys *(on page 68)*.
3. To modify a published Journey, see Modifying the details of a Journey *(on page 70)*.
4. To move published journeys from one folder to another, see Moving Journeys to another folder *(on page 70)*.

From V12.1.4, Publish view feature is introduced for viewing configuration of published and complete Journeys. On Journey Canvas screen double click on the desired touchpoint to see the configuration in View only mode (you cannot edit the configuration). Save button will remain disabled to ensure no modifications are made.

For Link touchpoint, a summary page with all configuration details is invoked.

> **Note:** The labels for this connector settings may not be accurate. Please pause and edit the journey for exact labels.

For Deliver touchpoint, the configuring screen used for configuring journey appears with all options disabled.

> **Note:** When Journey is published and audiences start entering in the Journey, then Journey shows statistics of all these audiences at every touchpoint of the Journey. In between if user updates the Journey by pausing and adds new touchpoint in the start of the Journey and re-publish it. Then, in statistics view Journey shows the counts for newly added touchpoint from the time it is added and user can see different counts flowing through this first touchpoint (not start) and existing touchpoints. On start and very first newly added touchpoint counts will be shown same.

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 112)*.
2. To add or remove columns from the listing page, see Adding or removing listed columns in Journeys *(on page 68)*.
3. To modify a draft Journey, see Modifying the details of a Journey *(on page 70)*.
4. To move draft journeys from one folder to another, see Moving Journeys to another folder *(on page 70)*.
5. To delete draft journeys, see Deleting Journeys *(on page 71)*.

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 112)*.
2. To add or remove columns from the listing page, see Adding or removing listed columns in Journeys *(on page 68)*.
3. To modify a paused Journey, see Modifying the details of a Journey *(on page 70)*.
4. To move paused journeys from one folder to another, see Moving Journeys to another folder *(on page 70)*.

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 112)*.
2. To add or remove columns from the listing page, see Adding or removing listed columns in Journeys *(on page 68)*.
3. To modify a completed Journey, see Modifying the details of a Journey *(on page 70)*.
4. To move completed journeys from one folder to another, see Moving Journeys to another folder *(on page 70)*.

> **Note:** When Journey is completed or ended for some or all audiences, then such audience data is moved from journeyaudiences table to endjourneyaudience table.

> **Note:** Publish view feature is introduced for viewing configuration of published and complete Journeys. On Journey Canvas screen double click on the desired touchpoint to see the configuration in View only mode (you cannot edit the configuration). Save button will remain disabled to ensure no modifications are made.

Reports

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

Note: User 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 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.

Note: Email Link click count displayed on mouse hover over email touch point is different than email link click count displayed in the performance tab. Count displayed on mouse hover is the total Audience count; however, performance tab displays the actual count of email link click.

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.

Hover on the Rest API icon to know the count of Sent, Success and Error count. Sent count will be the sum total of Success and Error count. Click on Sent and Success count hyperlink will invoke **Sent** and **Success** details pages. The screen will display the following information, Date & Time, First Name, Last Name, Email address and DOC. Click on Error count hyperlink will invoke **Error** details page. The screen will display the following information, Date & Time, Error Message, First Name, Last Name, Email address and DOC.

Performance

Click on performance tab to view Email Performance and SMS Performance.

Note: For performance evaluation data is recorded in the Journey time zone (TZ string)

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.

Push Performance: To review the performance of Push inside the journey , this section will give user the information about the overall performance of Push delivered and Push opened against the total Push sent.

Refresh - See Common Functional Keys (on page 85)

Export Report - See Common Functional Keys (on page 85)

Time Period- See Common Functional Keys (on page 85)

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

- View/Edit Details - See Viewing or editing a Journey (on page 32) *(on page 62)*
- Settings - See Journey Settings (on page 43) *(on page 72)*
- Mark Journey as Complete - See Marking a Journey as Complete (on page 36) *(on page 65)*
- Duplicate - See Duplicating a Journey (on page 33) *(on page 62)*

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 75)

Pause and Edit - To pause or edit journey, see Pausing and Editing a Journey (on page 35) (on page 64)

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.

> **Note:** For daily, weekly, monthly and quarterly goals data is recorded in the Journey time zone (TZ string)

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.

> **Note:** Data is recorded in the Journey time zone (TZ string)

Refresh - See Common Functional Keys (on page 85)

Export Report - See Common Functional Keys *(on page 85)*

> **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 85)

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

- View/Edit Details - See Viewing or editing a Journey (on page 32) *(on page 62)*
- Settings - See Journey Settings (on page 43) *(on page 72)*
- Mark Journey as Complete - See Marking a Journey as Complete (on page 36) *(on page 65)*
- Duplicate - See Duplicating a Journey (on page 33) *(on page 62)*

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 75)

Pause and Edit - To pause or edit journey, see Pausing and Editing a Journey (on page 35) (on page 64)

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 85)

Export Report - See Common Functional Keys (on page 85)

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

- View/Edit Details - See Viewing or editing a Journey (on page 32) *(on page 62)*
- Settings - See Journey Settings (on page 43) *(on page 72)*

- Mark Journey as Complete - See Marking a Journey as Complete (on page 36) *(on page 65)*
- Duplicate - See Duplicating a Journey (on page 33) *(on page 62)*

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 75)

Pause and Edit - To pause or edit journey, see Pausing and Editing a Journey (on page 35) (on page 64)

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. Journey Template

Templates page lists all the saved Journey templates. Details like Template Name, Template ID, create date, Data Definition associated and preview is available on this page. Click on the Preview hyperlink to see the preview of the Journey template.

Hover the cursor over the required Journey and select ⋮ **>** 🗑 to delete a template.

Hover the cursor over the required Journey and select ⋮ **>** ⊕ to create a Journey using the template. The **Create Journey from this template?** dialog appears. Provide a name to the Journey and click on **Create**. User is redirected to the Journey canvas page.

> ✏️ **Note:** Journey template cannot be edited. For any changes in the template, user need to create a new Journey make the updates and save as template. No user roles and permissions are attached to Create template. Templates cannot be copied from one environment to another, user can use Journey import / export functionality for the same. Journey goals and Journey milestones will not be associated with template / stored in template.

> ✏️ **Note:** Journey templates can be stored in a folder structure similar to data definition and entry sources. Journey templates can also be searched through global search bar as we have currently for entry sources, data definition and Journeys. There can be templates with same name but different template IDs. The template will get saved with data definition details. Entry sources associated with the Journey would not be saved with the template. Journey settings will be saved in the template.

Chapter 8. Create Stop Audience

From version 12.1.5, we have introduced a new feature named **Stop Audience**. You can use this feature to stop or pause the Journey for certain audiences.

The **Stop Audience** feature is accessible from the Journey Canvas. Use the Stop User feature to create rules that stops certain audiences matching the rule.

Using Stop Audience to pause the Journey for a few users

To stop the Journey or pause the Journey for a few users, complete the following steps:

1. Access the concerned Journey.
2. Click **Create Stop Audience**.
3. Click **Stop Audience**.

   The **Stop Rules** panel appears.
4. Click **+ Stop Request**.

   The **New Stop Request** panel appears.
5. Perform the following steps in the **New Stop Request** panel:

   a. Provide values for the following fields:
      - **Name**
      - **Description**

   b. Use the following options create or delete a rule or a rule group:
      - **Add Rule** - Select **Add Rule** to add a rule or a criteria that needs to be met. Use the condition toggle **OR** / **AND** to concatenate multiple rules or to concatenate a rule with a rule group. Select **X** to remove the rule.
      - **Add Group** - Select **Add Group** to add a rule group. A rule group contains multiple rules. Use the condition toggle **OR** / **AND** to concatenate rules within a group and to concatenate a rule group with other rule groups or a rule. Select **Delete Group** to delete the rule groups. You can also select **X** to remove individual rules within a rule group. A rule group should have a minimum of two rules.

6. Click **Calculate Count**.

   The Rule appears in the **Stop Rules** page and the calculation process begins. In the **Stop Rules** page you will see the following details:
   - **Rule Name**
   - **Description**
   - **Executed On**
   - **Executed By**
   - **Audience Count**
   - **Audience Affected**

- ◦ **Created By**
- ◦ **Created On**

7. Post calculation, the **Audience Count** for the rule is populated.

8. To execute the rule , click the **Execute Rule** button preceding the rule. A warning message appears indicating that once the rule is run , it cannot be reversed.

The rule execution begins. You cannot **+ Stop Request** when a rule is running.

> **Note:**
> - ◦ The audiences are stopped in batches. Hence the end result could be a complete success or partial success.
> - ◦ The actual number of stopped audiences might differ from the number of audiences calculated as more audiences may have entered the Journey during rule execution.

9. Post execution of the Rule, the Audience Stopped (*n*) panel for the rule appears where *n* is the number of audiences that are going to be paused or stopped. Click **Export Stopped Contacts** to export the list of audiences to a CSV file.
   - ◦ After executing the rule, you cannot delete or re-execute or modify the rule.
   - ◦ During the execution of the rule, updated stopped audience count in the **Stop Rules**. Click the count values to view all the stopped audiences for a given rule.
   - ◦ Audience information is listed in descending order of their pause time on a separate page.

10. The Rule page appears showing the rule and the list of audiences stopped. Click **Cancel**.

The Rule listing page appears with a dialog **Stop Contacts?**

11. Clicking **Yes, Confirm** will stop the Journey for the number of audiences mentioned irrespective of where the audience is in the Journey. If you click **Yes, Confirm**, the operation cannot be revered.

Chapter 9. Clean-up Journey Audiences

From V12.1.7 onwards, journey audiences can be removed from live running journeys. There will be a cron job scheduled (customer can configure cron expression as required), which will find all audiences with status JOURNEY_COMPLETED and JOURNEY_ENDED and will remove those, as well as their related data (like audience responses, milestone, goals, etc data) from respective tables. This removed data will not be recoverable. This will help in improving overall performance of journey engine. To support this feature, introduced properties in engine's `application.properties` file. More information about these properties are added in Journey Administrator's Guide.

Chapter 10. Offer Integration with Journey

Journey support offer from Centralized Offer Management (COM). Offer created in COM can be directly associated in email touchpoint with Link connectors in Unica Journey.

In Unica Deliver application user can associate offers with Deliver Email communications and these Deliver Email communications can be configured with Email Deliver touchpoints. Offers assigned to email communication will get associated with Email touchpoint in Unica Journey

Journey supports offer integration through following channels:

- Deliver Offer Integration
- Link offer Integration
- Interact Next Best Offers (NBO)

Along with this Journey also supports Content History and Response history (CH/RH) tracking for the offers delivered via Journey.

Deliver Offer Integration

Users create offers in Centralized offer management system and associate those offers with Deliver Email communication.

Prerequisites

- Create Offers in Centralized Offer Management (COM)
- Create Email communication with Offer in Unica Deliver.
- Create Email communication with offers for each email touch point that you configure using Unica Deliver. For more information on creating Unica Email communications with Offers for Unica Deliver, see *Unica Deliver User Guide.*

To configure an email touchpoint with Deliver, complete the following steps:

1. In the **Email Configuration** dialog, select **Deliver**.
2. Click on **Next**.
3. The **Select Template** dialog appears.
4. Landing page - On Journey canvas, user can configure email with Deliver. If that email template in deliver has landing page associated with it then user should be able configure Journey data definition fields with Landing page fields and when end user provides any input, as per mapping fields user input will be available in Journey. User can use them in decision split.
5. Offer Configuration - Select the required email communication. If there are multiple email communication, use the Search bar to locate the required email communication. Email communication having offers associated will be displayed on the right side of the screen along with the number of offers configured in that email communication. Example if one offer is associated with the email communication then 1 Offer will be

displayed. When user hovers on Offer, then offer code and offer expiry date details appear. When user clicks on the Offer, then Offer details screen appears.

6. Click on **Next**.

7. The **Mapping** dialog appears.

8. **Personalization Fields Mapping** - 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.

9. **Landing Page Response Mapping** - Map the Journey fields with the appropriate Landing Page fields. When user gives the input using Landing page, then based on mapping fields user input will be available in Journey.

> **Note:** Journey would not be able to recognize the Landing Page form fields name by its Label Name - Journey can only recognize the Landing Page from fields by their **Report Field Name** attribute.

10. Click on **Save**.

Points to Consider

- If two landing pages attributes mapped in Email communications, one of the Landing page attributes are not getting in Journey.
- If user do modify the Landing page, then for getting these changes available in Journey user needs to republish the Landing page and Email communication, do copy of email communication and by pausing the Journey do reconfigure this copied email communication.
- If any change is made in deliver communication, then user needs to reconfigure email touchpoint to get the changes reflected in Journey.
- If an email template having offers assigned is associated in Journey, then Journey will fetch those offers and the responses received from the emails are captured in Contact and response history.
- User would need to use the offer template which has Offer effective and expiry date provided as fixed dates and not the flowchart run date / number of durations after effective date.
- Unica Journey does not adhere to the Effective and Expiry dates while evaluating/ sending offers to the communication channels. User would need to manually remove the offers expired and assign active offers.
- If Journey partition setting for the corresponding Journey is not saved, then in that case contact history and response history (CH/RH) will not be captured for the associated offer. If user proceeding without saving the journey partition, then a warning message is displayed saying You don't have partition settings saved for journey. To save the response history and contact history (CH/RH) it is important to save partition settings in journey. You can save the settings from the settings menu.
- For a Journey, if an offer attribute with visibility rule is assigned with deliver email template, then Journey does not support tracking the CH/RH for the offers with visibility rules.
- If an email template having offers assigned is associated in Journey, then Journey will fetch those offers and the responses received from the emails are captured in Contact and response history database tables of Unica Campaign.

- If there is any change in offer attribute on deliver side after associating the Deliver email-communication to Journey touchpoint, then this will not reflect in Journey. Deliver- offer association with Journey is Read Only. Offer attribute mapping is not supported for data-definition field screen.
- In Journey we are not supporting all the offer functionality, which is supported in Deliver with batching. The plain vanilla thing for offers supporting in Journey-Deliver.
- Journey tracks the link clicks and Linkurl which user clicks in Deliver email. These links can be used in Journey engagement split and can also be used to track the goals progress. Unlike Offer click-through links will only be captured by Journey for response tracking purpose only. These offers click-through urls will not be available in Journey engagement split and for Journey goals calculations. Links available in Deliver emails for Offers will not be listed on Engagement split page and Goals page for link click events. On Goal historical page, for non-frequency based link click goals, offer links URLs will not be available in Link drop down. Deliver "Link Clicks" count of offer links will be added as a part of total link click count for non-frequency based link click goals.
- Journey Deliver offer integration is not supporting Offer attribute value modifications, If this offer is in use then these modified offer attribute values will not be available in Journey.
- Journey allows duplicate records. Whenever an audience enters an email touchpoint in Journey, it will receive an offer. This offer will be reported as a contact in Campaign's Contact history tables. When the same audience ID re-enters the same email touch point, the same offer is presented once again to that audience ID. When this duplicate contact is posted to Campaign, it discards the duplicate contact record stating- **The contact for same customer with same offer is already reported**. In such case where Journey allows duplicate records to enter Journey, the offers (contacts) that are presented only for the first time are captured. Subsequent contacts for the same audience ID with same offer are discarded. If user does not want same audience to process multiple times, then it is recommended that user should select **Do not allow duplicate contacts** radio button in Journey settings. If user pushes same audience multiple times in same Journey, then only first contact is recorded. Subsequent contacts for the same audience ID with same offer are discarded.
- Not all Centralized Offer Management attributes are supported on Deliver side for offer integration.

Following offer attributes are supported when offers are assigned in Deliver email communication and responses are recorded in Journey :

- **Standard Attributes**
  - Average response revenue
  - Channel
  - Channel type
  - Cost per offer
  - Creative URL
  - Effective date and expiration duration
  - Fulfilment cost
  - Interaction Point ID
  - Interaction point name
  - Offer Fixed Cost
- **Custom Attributes**

- Text field – String
- Text field – Numeric
- Text field – Date
- Text field – currency
- Select box – String

Following offer attributes are not supported when offers are assigned in Deliver email communication:

- Boolean
- Integer
- URL
- Rich Text
- Select box- Database

- If a user tries to delete an offer for which Contact/Response history is already populated through Journey-Deliver offer integration, then that offer gets retired in COM upon deleting. Hereafter, if user pushes new audiences, then Contact/Response history will be generated for these audiences even though the offer is in retired state.
- If a user configures deliver touchpoint with an offer but the Journey is still in Draft state (not published), then user will be able to delete this Offer from COM. Hereafter, user can publish the Journey. Emails will be sent to the audiences but Response History will not be generated in Campaign.
- When you configure Email and SMS deliver touchpoint, you can see the preview of the communication from Journey. You can access this from the communications list used for verifying the selected communication. The preview gives you an idea of how the end-communication looks like before executing the Journey.

> ✏️ **Note:** Only the communications created in Deliver Quick Builder are rendered as thumbnails in the communication listing screen.

- Journey Deliver offer integration does not support COM offer variations and Offers without template.
- In Journey Deliver offer integration, Journey is not capturing OfferUrl and OfferstaticAttributejson information hence these columns is shown as Null in Journey database offermetadata table. Journey is not supporting COM static attributes.
- If user is unable to see Offer Code and Offer Expiry on tooltip, then they need to increase token validity in platform (set validity to 1800 on **Platform > Settings > Configuration > General > Miscellaneous > Token lifetime**). After increasing token validity in platform restart Platform and Offer application.

Link Offer Integration

User can assign offers and offer variations with Journey touchpoints sent across through Link connectors. For more information, see Centralized Offer Management Administrators Guide.

Pre-requisites for Centralized Offers Management and Unica Journey integration.

If user are using Centralized Offers Management (COM) in Unica Journey for Link connections, user will need to configure Unica Marketing Platform configurations as mentioned below:

1. User would need to increase the token validity in Marketing Platform configuration to 10800 seconds (3 hours)

   Navigate to Settings for 'Miscellaneous' (Affinium|Manager|miscellaneous)

   Set Token lifetime = 10800

2. Disable Platform flag for single time token usage, by configuring the below settings:

   Navigate to Settings for 'API management' (Affinium|suite|security|apiSecurity

   Enable session-based API authentication – Enabled

   Delete security token after a single use - Disabled

3. The above setting should be disabled in Platform for both Campaign and Centralized Offer Management.

To configure an email touchpoint with Link, complete the following steps

1. In the **Email Configuration** dialog, select **Link**
2. Add Offers - Check the checkbox **I want to associate Offers to this touchpoint (template)** for associated offer in emails.
3. Click on **Select Offers**.

   > **Note:** If Journey partition setting for the corresponding Journey is not saved, then in that case contact history and response history (CH/RH) would not be captured for the associated offer, then options Select Offers will be disabled. After the partition setting is saved the Select Offer options is enabled.

4. The **Offers screen** from Centralized Offer Management appears. User can select one or multiple offers from the list of offers displayed or double click on the offer to select from the offer variant.
5. Click on **Select Offers**.
6. The **Offer response mapping** page appears. Associate every offer with the link url. If the URL is not provided then history of CH/RH will be lost. Enter that URL on this screen for which offer response needs to be tracked (Pre-requisite- the link should be existing in the email template being used)
7. Click on **Done**.

Points to Consider

- For Journeys created before versions 12.1.1, existing email touchpoint cannot be associated with Link Offers.
- User would need to use the offer template which has Offer effective and expiry date provided as fixed dates and not the flowchart run date / number of durations after effective date.
- Unica Journey does not adhere to the Effective and Expiry dates while evaluating/sending offers to the communication channels. User would need to manually remove the offers expired and assign active offers.
- When offer integration is done with Link Mailchimp connector, for the first link click two responses might be received. Based on the email client behaviour, on how they handle the link click Mailchimp might receive duplicate link click event - which will result in duplicate response for the assigned offer to the link.

- With Journey when the offer attribute with visibility rule is assigned to Link touchpoint, then Journey does not support tracking the CH/RH for the offers with visibility rules. Irrespective of Offer visibility rule all offer attributes are displayed in the dropdown of Link field mapping.
- Not all Centralized Offer Management attributes supported on Link side for offer integration. After offer integration attributes not supported on Link side are not reflected. Following attributes are supported by Link:
    - integer
    - date
    - boolean
    - channel type
    - string

Interact Next Best Offers (NBO)

While audience is navigating through the Journey, then Journey can get the best personalized offers from Interact at runtime and send those offers to audiences via Link channel.

To configure an email touchpoint with Interact NBO, complete the following steps:

1. In the **Email Configuration** dialog, select **Link**
2. Add Offers - Check the checkbox **I want to associate Offers to this touchpoint (template)** to associate offers in emails.
3. Click on **Next Best Offer**

    Note: NBO button will be enabled even if partition settings are not saved for Journey. NBO button will remain disabled if Interact is not installed on platform.

4. The **Next Best Offer page** appears.
5. Provide appropriate values for the following fields:
    - ▪ Interactive Channel - It is a mandatory field. Select the Interactive channel which is deployed on Interact Runtime. If user does not select the deployed Interactive channel, then test connection will not work.

        Note: In certain situations, where Interactive channel (selected in Journey which is in published state) is updeployed from Interact runtime, then Journey will not receive any offer for audiences from Interact and it will show transactions in error state. Audiences will move to the next touch point without any email send.

    - ▪ Audience level - Mandatory field
    - ▪ Interaction point - Mandatory field
    - ▪ Select event - Mandatory field (Only events associated with contact action will be available for selection).

- Interact Runtime URL - Mandatory field (Only one runtime URL can be mapped at a time).
- Interact Profile Fields Mapping - Map interact fields with Journey fields.

◦ Click on **Done**.

📝 **Note:**

a. When user selects the Interactive channel and the audience level, then only user will get the Interact profile table fields for mapping. Interact profile table fields can be mapped with Journey audience (data definition) fields, so when Journey is published audience information will be passed to Interact runtime as startSession API call. User should take care while mapping the fields like string data type of data definition fields should not be mapped to numeric Interact profile table fields and vice-versa.

b. Currently, Interact next best offer integration is only supported with partition1.

c. Static/strategic segment when configured in Interact will not work with NBO.

Contact History/Response History Tracking

Contact history and Response history (CH/RH) for the offers delivered from Journey will be tracked in Centralised history (CH) table of Campaign. Offer delivered by Delivery Email channels, Link connectors or by interact, using link delivery channels are recorded for CH/RH tracking. This tracking is done under respective Campaign Contact history tables.

In Journey when a user assigns an offer with Deliver communication, link connector or with Interact, they need to specify the partition and the audience level for which the history will be tracked. Based on the selected partition and audience level, history tables will be populated in Campaign schema. History related information can be used in Campaign. User can send this information from Campaign to Journey to verify how customer contact and responses are working.

Whenever a user adds a new audience level on Campaign settings, please make sure to restart Campaign web application. Only after starting this, user will be able to synchronize the contact and response history for newly added audience level.

Journey contact and responses will be synchronized with Campaign contact and Response history tables via Kafka topic- UNICA_CH_RH. All the contact and responses on this topic are consumed by Campaign application and they are synchronized in to history tables. Even though Campaign consumes the history records from kafka, they will continue to display on UNICA_CH_RH topic based on kafka configuration, which states how long these messages would be available on Kafka topic.

If there are multiple kafka consumers to Campaign group, contact history and response history that get populated might behave inconsistently. To check consumers on a kafka instance please use below command

kafka-consumer-groups.sh -bootstrap-server <kafka_host>:<port> --describe -group Campaign

Chapter 11. 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:** LinkedIn responses are modified and following responses are available on configured LinkedIn touchpoint. **Audience size**, **Matched count** and **Audience status**. Unica link sends these responses to Journey and depending on link response, Audience size, Matched count and Audience status are available on Linkedin 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.

Setting a default PUSH connection

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

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

1. Select ⚙ **> Link > Push**.
   The **Push** page appears.
2. From the **Available Connections** list, select a connection.
   The available connection includes `Batch_Android` and `Batch_iOS`. For more information, see Manage connections *(on page 100)*.
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.

5. To create a Batch connection for Android or iOS, 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. For example, `Batch_Android` / `Batch_iOS`
- **Description** - Optional

c. Click **Next**.

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

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

- **BAse URL**
- **Live Key**

- **Rest 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.

> **Note:** If you want Batch connection for both Android and iOS, you must create a Batch connection for
> each.

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
   11)*.

7. Generate the authentication token using the URL example: "http://comp-4946-.nonprod.hclpnp.com:80/
   journey/api/thirdpartylogin". Use this authentication token and entry source code while sending the data.

> **Note:** Entry source code is mandatory to send data on REST entry source.

8. 8. REST API end point (as available on REST entry source creation page) example - http://
   comp-4946-1.nonprod.hclpnp.com:80/journey/api/entrysources/rest/data

9. Sample format of JSON that /journey/api/entrysources/rest/data takes as input is as below -

   {

   "entrySourceCode": "ES-00000125",

   "data": [

   { "Email": "pooja_roy@abc.com", "FirstName": "Pooja", "LastName": "Roy", "Age": 30, "Address":
   125, "CreatedDate": "15 09 22", "PHONE_NUMBER": "+91**********", "DeviceID":"ac79649c-
   ca1b-4c3f-99ce-56d5ad69fbba" }

   ]

   }

   > **Note:** The json fields should be changed as per the data definition which is associated with the
   > journey.

10. Journey should be in published state before pushing the data on REST entry source.

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 .

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**.

Developer Tools

Displays the list of developer tools.

API Documentation

You can find the list of API in Journey done though Swager UI. Swagger v3 UI does not support IE 11.

If AWS ELB (Elastic Load Balancing) is on HTTPS and Journey product is on HTTP, If Journey Swagger API page is not loading or Swagger API are not executing, user needs to Configure Tomcat for SSL offloading by adding below **parameters connector tag in server.xml**:

Example: /opt/Tomcat/Journey_instance/conf/server.xml

<Connector port="7010" protocol="HTTP/1.1"

connectionTimeout="20000"

scheme="https" secure="true"

redirectPort="9010" />

Chapter 12. 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 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 13. 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 110)*.
Search a folder	For more information, see Searching a folder *(on page 111)*.
Edit a folder	For more information, see Editing a folder *(on page 111)*.
View folders	For more information, see Viewing a folder *(on page 111)*.
View artifacts within a folder	For more information, see Viewing artifacts within a folder *(on page 112)*.
Move a folder or multiple folders to another folder	For more information, see Moving a folder or multiple folders *(on page 113)*.
Remove a folder or multiple folders	For more information, see Deleting a folder or multiple folders *(on page 113)*.

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
   .

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 111)*.

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 110)*.

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**.