HCLSoftware

Unica Contact Central V12.1.7 User's Guide

Contents

Chapter 1. Accessing Unica Contact Central

Contact your Unica administrator to confirm if Contact Central configuration is complete.

Before you begin

Details related to the Contact Central configurations are available in the *Unica Contact Central Administrator's Guide*.

About this task

To access Contact Central, perform the following steps:

1. Log in to the Unica application.
   Result
   The Unica homepage appears.
2. Select the **ContactCentral** menu.
   Result
   The **Contact Central** page appears.

> **Note:** If you cannot see the **ContactCentral** menu, contact your Unica administrator.

Contact Central User Interface

The Contact Central user interface is simplistic and intuitive. The user interface consists of the following tabs: Channel Preferences and Regional Preferences.

Channel Preferences

The tab lists all the communication channels available for sending marketing communication to customers. The available channels are:

- Email
- SMS
- Push
- WhatsApp

Regional Preferences

Use the tab to set region-based preferences for sending marketing communications.

Chapter 2. Channel Preferences Overview

The **Channel Preferences** tab lists all the communication channels available for sending marketing communication to customers.

The available channels are:

- Email
- SMS
- Push
- WhatsApp

You cannot add or delete the available channels. The application provides it out-of-the-box.

You can use the **Channel Preferences** tab to:

- View all communication channels.
- Set a limit for sending communications in each channel.
- View a report of the daily or weekly capacity consumed per channel.
- View a report of the products that sent marketing communications using a communication channel.
- View a list of all regional preferences using a communication channel.

Viewing Channel Details

Accessing each marketing channel provides details related to that channel. The details include daily capacity consumed, Unica products that are using the channel, and the list of Regional Preferences using the channel. You can also set a capacity or limit for the channel.

About this task

To view each channel details, complete the following steps:

1. Access Contact Central. For more information, see .
   Result

   The default selection is the **Channel Preferences** tab.
2. Select from one of the following **Channels**:
     - **Email**
     - **SMS**
     - **Push**
     - **WhatsApp**
   Result

   The corresponding channel page appears.
3. The following information appears in the selected channel page:

- A **Channel capacity** button. If you wish to set a limit and frequency for each communication channel, click **Channel capacity**. For more information, see .
- A graph representing the limit consumed based on the set frequency. The graph appears only if you set the limit and use the channel in a regional preference.
- A graph representing the products using the channel for communication. The graph appears only if a Unica product has integrated Contact Central with it. Contact Central integrates only with the following Unica products:
  - Unica Interact
  - Unica Journey
- The list of regional preferences using the channel for marketing communication. Select the arrow key succeeding the regional preference name to expand and view the details of the regional preference. Select the arrow again to collapse the view.

Setting Channel Capacity

You can set limits, for each communication channel for a selected frequency (Daily or Weekly).

About this task

To set limits for communication channels, complete the following steps

1. Access Contact Central. For more information, see .
   Result

   The default selection is the **Channel Preferences** tab.
2. Select from one of the following **Channels**:
   - **Email**
   - **SMS**
   - **Push**
   - **WhatsApp**

   Result

   The corresponding channel page appears.
3. Click **Channel capacity**.
   Result

   The **Channel capacity:**<*channel-name*> panel appears, where <*channel-name*> is the channel you selected in *Step 2*
4. 📝 **Note:** The default setting is **Send without capacity**.

   To set a capacity for sending communications, move to *Step 5*. To send communications without setting a capacity, complete the following steps:

   a. Type an appropriate **Description**.

   b. Select the option **Send without capacity**.

   c. Click **Save & close**.

Result

A success message appears.

5. Ignore this step if your requirement was the one mentioned in *Step 4*. To set a limit to communications, complete the following steps:

   a. Type an appropriate **Description**.

   b. Select the option **Send with capacity**.

   c. Select or provide appropriate values for the following fields:

Field name	Description
Capacity	Enter the capacity or limit of communications that you want to set for a particular **Frequency**. For example, set `10,000` emails daily or `10,000` emails weekly.
Frequency	Select the required frequency for the limit set in the **Capacity** field. The available options are: • `Daily` • `Weekly` For example, set `5,000` SMSs daily or `5,000` SMSs weekly.
Select time zone	Select the time zone that is used to calculate start date time and end date time for the given frequency. 📝 **Note:** • If you are updating an existing channel capacity, the new value must be greater than the total consumed capacity within the new frequency. • Once you define channel capacity, it resets automatically after reaching the end time. Start time and end time is calculated using the provided frequency and time zone. For example, if time zone is Asia/Kolkata and frequency is Weekly, start date will contain start

Field name	Description
	✏️ of current week and end-date will contain end of current week for Asia/Kolkata timezone.

6. Click **Save and close**.

   Result

   The channel capacity is set for the selected time zone.

Chapter 3. Regional Preferences Overview

Use the **Regional Preferences** tab to set region-based preferences for sending marketing communications.

You can use the Regional Preferences tab to:

- Create, view, modify, and delete region-based preferences for marketing communications.
- Search existing region-based preferences.
- Set marketing communication channels for region-based preferences.

You can create only one regional preference per time zone options.

For example, if you have created a regional preference for the `(UTC-6:00) America/Denver` time zone option, you cannot create another regional preference for the same time zone option.

Adding Regional Preferences

You can add regional preferences to send communication mailers or messages to a specific region.

About this task

To add regional preferences, complete the following steps:

1. Access Contact Central. For more information, see .
2. Select **Regional Preferences**.
3. In the **Regional preferences** section, click **+ Regional preference**.
   Result
   The **Create new preference** page appears.
4. Type an appropriate **Name**. This is a unique field.
5. As per your requirement, **Select time zone**.
6. Click **Save**.
7. ✏️ **Note:** You can create only one regional preference per time zone.

   You can perform the following additional actions on the new regional preference:

Viewing Regional Preferences

After adding a regional preference, it appears in a list along with a few details of the regional preference that are available for quick reference.

About this task

To view regional preferences, complete the following steps:

1. Access Contact Central. For more information, see Accessing Unica Contact Central on page 1.
2. Select **Regional Preferences**.
3. In the **Regional preferences** section, you will see a list of all the **Regional preferences** that you have added. Each regional preference provides the following information for quick reference:

```
<regional-preference-name>            <no. of channels>
<time zone>
```

where:

- *<regional-preference-name>* is the name assigned to the Regional preference.
- *<time zone>* is the time zone assigned to the Regional preference.
- *<no. of channels>* is the number of channels added to the Regional preference.

For example:

```
Americas-MST                          2
(UTC-6:00) America/Denver
```

Searching Regional Preferences

If there are too many **Regional preferences**, you can locate the one you want using the **Search preference** bar.

About this task

To search for a Regional preference, complete the following steps:

1. Access Contact Central. For more information, see Accessing Unica Contact Central on page 1.
2. Select **Regional Preferences**.
3. In the **Regional preferences** section, place the cursor in the **Search preference** bar and type the name of the Regional preference you wish to search.
4. Press the Enter key or select .
   Result
   If a match exists, the results appear. If a match does not exist, the system displays No search found.

Deleting Regional Preferences

If there is a need to delete a regional preference, you can delete it using the **Delete regional preference** operation.

About this task

To delete a regional preference, complete the following steps:

1. Access Contact Central. For more information, see Accessing Unica Contact Central on page 1.
2. Select **Regional Preferences**.

3. In the **Regional preferences** section, locate the required **Regional preference** and access it, or use **Search preference** to locate the required regional preference and access it. For more information on search, see Searching Regional Preferences on page 7.

4. Click **Delete regional preference**.

   Result

   A confirmation box appears.

5. Click **Confirm**.

⚠️ **CAUTION:** Deleting a regional preference impacts products that are consuming the regional preference.

Adding Channel Preferences to a Regional Preference

User can add a channel preference to define a communication window for one or more channels.

About this task

In a regional preference, a communication channel can be associated with only one channel preference.

For example, if you create a regional preference named `Americas-MST`, you can add two channel preferences to it.

Channel preference name	Select options	Use
Preference1	• Email	For channel preference named Preference1, the communication channel used is Email.
Preference2	• Push • SMS • WhatsApp	For channel preference named Preference2, the communication channel used is Push, SMS, and WhatsApp.

📝 **Note:** In the earlier table, if you use `Email` in `Preference1`, you cannot use `Email`, again, for `Preference2`.

To add channel preferences to a regional preference, complete the following steps:

1. Access Contact Central. For more information, see Accessing Unica Contact Central on page 1.

2. Select **Regional Preferences**.

3. In the **Regional preferences** section, use **Search preference** to locate the required regional preference and access it. For more information, see Searching Regional Preferences on page 7.

4. Click **+ Channel preference**.

   Result

   The **Add Channel Preference** panel appears.

5. Complete the following steps in the **Add Channel Preference** panel.

a. Type an appropriate value for **Channel preference name**.

b. In **Select options**, select one or multiple channels. For more information on available options, see Channel Preferences on page 1.

> **Note:** If you have selected one channel for a channel preference, you cannot select the same channel for another channel preference. The channel is disabled for selection.

c. Select the required **Communication days**. If you have made an incorrect selection and want to remove it, select the option again. It is mandatory to select at least a single day.

d. For the **Communication hours** field, to specify the start time and end time for sending communications, select appropriate values for **Day Start** and **Day End**. **Day Start** refers to the start time and **Day End** refers to the end time for sending communications. Alternatively, to send communication messages throughout the day for the selected **Communication days**, select **All day**.

> **Note: All day** refers to throughout the day on selected communication days.

e. If required, you can add exclusions on the selected **Communication days**. You can add exclusions if there is a holiday, planned outage, or other reasons. You can add multiple exclusions.
    i. **Select date** for exclusion.
    ii. Type the **Reason for Exclusion**.
    iii. Select the **Type of Exclusion**.
    iv. Click **Add**.

    To add multiple, perform the steps again. To remove an existing exclusion, select **X** succeeding the exclusion date.

f. Click **Save & close**.
    Result
    The **Channel preference name** appears in the **Channel preferences** section of the Regional preference.

Viewing Details of the Added Channel Preference

After adding channel preferences to regional preferences, you can expand the channel preference to view the details.

About this task

To view the details of the added channel preferences, complete the following steps:

1. Access Contact Central. For more information, see Accessing Unica Contact Central on page 1.
2. Select **Regional Preferences**.
3. In the **Regional preferences** section, use **Search preference** to locate the required regional preference and access it. For more information, see Searching Regional Preferences on page 7.
4. In the **Channel preferences** section, select ⌄ for the required channel preference.

Result

The channel preference expands to display the details. Select ︿ to collapse the details.

Modifying the Added Channel Preference

If you want to modify the values and selections of a channel preference, you can do it by using the edit icon.

About this task

To modify the values of an added channel preference, complete the following steps:

1. Access Contact Central. For more information, see Accessing Unica Contact Central on page 1.
2. Select **Regional Preferences**.
3. In the **Regional preferences** section, use **Search preference** to locate the required regional preference and access it. For more information, see Searching Regional Preferences on page 7.
4. In the **Channel preferences** section, select ✎ for the required channel preference.
   Result
   The **Channel Preference** panel appears.
5. Make the necessary modifications. For more details about the fields, see Adding Channel Preferences to a Regional Preference on page 8.

Deleting Channel Preferences from a Regional Preference

You can delete channel preferences from a regional preference.

About this task

To delete channel preferences from a regional preference, complete the following steps:

1. Access Contact Central. For more information, see Accessing Unica Contact Central on page 1.
2. Select **Regional Preferences**.
3. In the **Regional preferences** section, use **Search preference** to locate the required regional preference and access it. For more information, see Searching Regional Preferences on page 7.
4. In the **Channel preferences** section, select 🗑 for the channel preference that you want to remove.
   Result
   A confirmation box appears.
5. Click **Confirm**.

⚠️ **CAUTION:** Deleting a channel preference impacts products that are consuming the channel preference.

Chapter 4. Customer Consent Overview

The **Customer Consent** tab provides a detailed report of the customer consent for the available communication channels.

A customer consent can be either of the following options:

- Opt-in for marketing or promotional communications for a specific communication channel.
- Opt-out of marketing or promotional communications for a specific communication channel.

You can use the Customer Consent tab to:

- View a graphical representation opt-ins and opt-outs for all delivery channels for a specific date range.
- View a detailed report of opt-ins and opt-outs for Email.
- View a detailed report of opt-ins and opt-outs for SMS.
- View a detailed report of opt-ins and opt-outs for Push Notifications.
- View a detailed report of opt-ins and opt-outs for WhatsApp.

Viewing Consent Summary

The **Consent Summary** section, in the **Customer Consent** tab, displays a graphical summary of the customer consent.

About this task

To view customer consent summary, complete the following steps:

1. Access Contact Central. For more information, see .
2. Select **Customer Consent > Consent Summary**.
3. Use **Date Range** to select the required date range. You can select the same date for both **From** and **To** date.
4. You will see the following details:
   a. A doughnut chart each for Opt-ins and Opt-outs.
   b. The total number of Opt-ins or Opt-outs for the individual communication channels.
   c. The percentage of Opt-ins for individual communication channels (this is visible on the doughnut chart)

Example

If you select a date range `01-Jan-2022` to `01-Jan-2022`, and if you see the following output for Opt-ins:

`Email: 5 | SMS: 10 | Push: 15 | WhatsApp: 20,`

the total Opt-ins for the selected date range is `5+10+15+20 = 50`. The system calculates the percentage, for individual communication channels, as follows:

- Email - percentage of 5/50 = `10%`
- SMS - percentage of 10/50 = `20%`
- Push - percentage of 15/50 = `30%`
- WhatsApp - percentage of 20/50 = `40%`

You can see percentage for individual communication channels on the doughnut chart. The same is applicable for Opt-outs as well.

Viewing Email Consent

The **Email Consent** section displays a detailed report of Opt-ins and Opt-outs from the Email channel.

About this task

To view Email Consent report, complete the following steps:

1. Access Contact Central. For more information, see .
2. Select **Customer Consent > SMS Consent**.
   Result
   You will see the following fields:

Field Name	Description
Opt-ins for Email	Total number of Opt-ins for Email communication.
Opt-outs from Email	Total number of Opt-outs from Email communication.
Email	The email address of the customer.
Audience Level	The customer type.
Audience ID	The ID of the customer.
Consent Type	The consent provided by the customer. The customer can either opt in or opt out of Email communications.
Consent Date Time	The date and time when the customer provided consent.
Source of Consent	The source application used to provide consent.
Opt-out Reason	If the customer chooses to opt out, the reason for opting out.

3. You can also execute the following filters:

   a. Use **Search** to find the appropriate record.

   b. Use **Consent Type** to filter records based on the type of consent. The available options are:
   - `All Consents` - Displays both Opt-in and Opt-out users.
   - `Opt-ins` - Displays only Opt-in users.
   - `Opt-outs` - Displays only Opt-out users.

   c. Arrange the records in ascending order or descending order of a particular field for the following fields:
   - `Email`
   - `Audience Level`
   - `Consent Date Time`
   - `Source of Consent`

Viewing SMS Consent

The **SMS Consent** section displays a detailed report of Opt-ins and Opt-outs from the Mobile SMS channel.

About this task

To view SMS Consent report, complete the following steps:

1. Access Contact Central. For more information, see Accessing Unica Contact Central on page 1.
2. Select **Customer Consent > SMS Consent**.
   Result
   You will see the following fields:

Field Name	Description
Opt-ins for SMS	Total number of Opt-ins for Mobile SMS communication.
Opt-outs from SMS	Total number of Opt-outs from Mobile SMS communication.
Mobile Number	The mobile number of the customer.
Audience Level	The customer type.
Audience ID	The ID of the customer.
Consent Type	The consent provided by the customer. The customer can either opt in or opt out of Mobile SMS communications.
Consent Date Time	The date and time when the customer provided consent.
Source of Consent	The source application used to provide consent.
Opt-out Reason	If the customer chooses to opt out, the reason for opting out.

3. You can also execute the following filters:

   a. Use **Search** to find the appropriate record.

   b. Use **Consent Type** to filter records based on the type of consent. The available options are:
      - `All Consents` - Displays both Opt-in and Opt-out users.
      - `Opt-ins` - Displays only Opt-in users.
      - `Opt-outs` - Displays only Opt-out users.

   c. Arrange the records in ascending order or descending order of a particular field for the following fields:
      - `Mobile Number`
      - `Audience Level`
      - `Consent Date Time`
      - `Source of Consent`

Viewing Push Consent

The **Push Consent** section displays a detailed report of Opt-ins and Opt-outs from the Mobile Push channel.

About this task

To view Push Consent report, complete the following steps:

1. Access Contact Central. For more information, see Accessing Unica Contact Central on page 1.
2. Select **Customer Consent > Push Consent**.
   Result
   You will see the following fields:

Field Name	Description
Opt-ins for Push	Total number of Opt-ins for Mobile Push communication.
Opt-outs from Push	Total number of Opt-outs from Mobile Push communication.
Install ID	The installation ID of the customer's mobile app.
Audience Level	The customer type.
Audience ID	The ID of the customer.
Consent Type	The consent provided by the customer. The customer can either opt in or opt out of Mobile Push communications.
Consent Date Time	The date and time when the customer provided consent.
Source of Consent	The source application used to provide consent.
Opt-out Reason	If the customer chooses to opt out, the reason for opting out.

3. You can also execute the following filters:

   a. Use **Search** to find the appropriate record.

   b. Use **Consent Type** to filter records based on the type of consent. The available options are:
      - `All Consents` - Displays both Opt-in and Opt-out users.
      - `Opt-ins` - Displays only Opt-in users.
      - `Opt-outs` - Displays only Opt-out users.

   c. Arrange the records in ascending order or descending order of a particular field for the following fields:
      - `Install ID`
      - `Audience Level`
      - `Consent Date Time`
      - `Source of Consent`

Viewing WhatsApp Consent

The **WhatsApp Consent** section displays a detailed report of Opt-ins and Opt-outs from the WhatsApp channel.

About this task

To view WhatsApp Consent report, complete the following steps:

1. Access Contact Central. For more information, see Accessing Unica Contact Central on page 1.

2. Select **Customer Consent > WhatsApp Consent**.

   Result

   You will see the following fields:

Field Name	Description
Opt-ins for WhatsApp	Total number of Opt-ins for WhatsApp communication.
Opt-outs from WhatsApp	Total number of Opt-outs from WhatsApp communication.
Mobile Number	The mobile number of the customer on which WhatsApp is installed.
Audience Level	The customer type.
Audience ID	The ID of the customer.
Consent Type	The consent provided by the customer. The customer can either opt in or opt out of WhatsApp communications.
Consent Date Time	The date and time when the customer provided consent.
Source of Consent	The source application used to provide consent.
Opt-out Reason	If the customer chooses to opt out, the reason for opting out.

3. You can also execute the following filters:

   a. Use **Search** to find the appropriate record.

   b. Use **Consent Type** to filter records based on the type of consent. The available options are:
      - `All Consents` - Displays both Opt-in and Opt-out users.
      - `Opt-ins` - Displays only Opt-in users.
      - `Opt-outs` - Displays only Opt-out users.

   c. Arrange the records in ascending order or descending order of a particular field for the following fields:
      - `Mobile Number`
      - `Audience Level`
      - `Consent Date Time`
      - `Source of Consent`