

selerix

ENGAGE

User Guide



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Chapter 1: Getting Started

Selerix Engage is a benefits communication software designed to automate every day communication needs while delivering personalized, meaningful messages to your workforce.


Roles

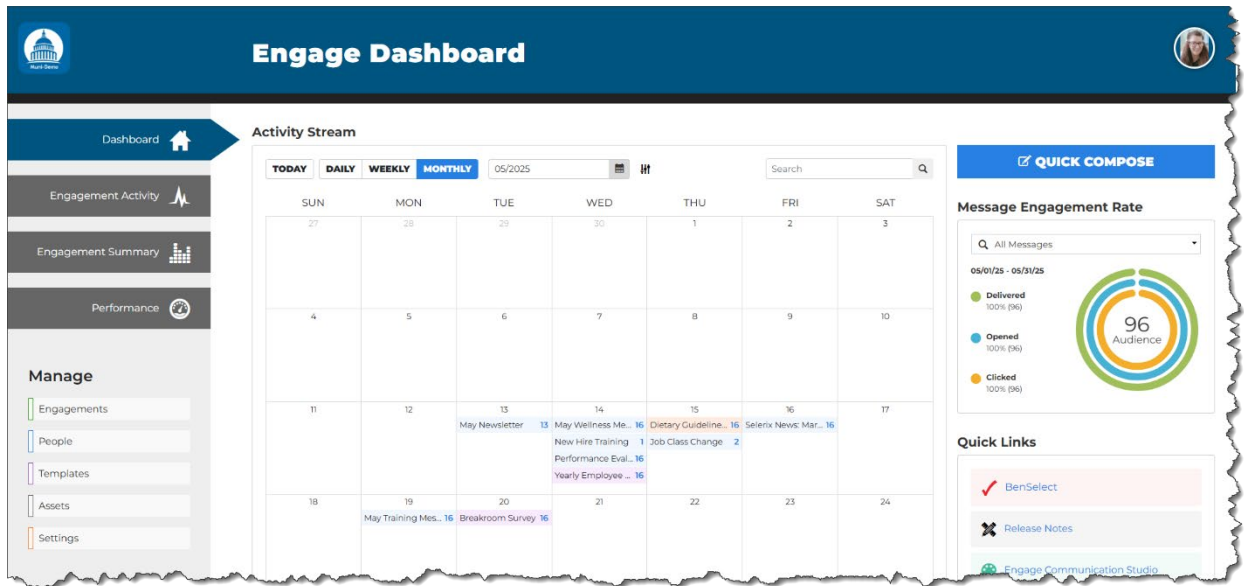
Selerix Engage provides user roles to give you control over the level of access administrative you will have within the Selerix Engage platform.

- **Engage Access** – provides user access to Engage only. This user permission will not be able to view or access sensitive employee data.
- **Engage Administrator** – user can add users, create content and audiences, and deploy engagements. This is the only role with access to the Performance, Activity, Summary and Settings screens.
- **Engage Audience Builder** – user can create content and audiences.
- **Engage Content Creator** – user can only create content.
- **Engage Content Publisher** – user can create content, audiences and deploy engagements.

To access roles (on the Admin site), go to the **Access** menu and click **Users**. On the Recent tab, search for existing user profiles or create new users. Click the Roles tab in the user's profile to select the appropriate Engage user role. If you do not have access to the **Access>>Users** menu, contact your case administrator or the Selerix Support Team at support@selerix.com.

Accessing Selerix Engage

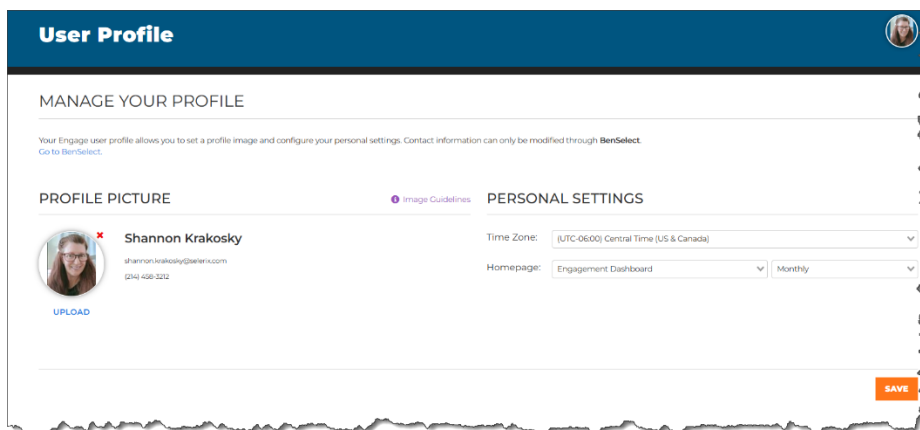
1. Open Selerix Engage by logging in to the BenSelect Admin site dashboard. Current BenSelect users utilize their current credentials. New users can request credentials via case administrators who are authorized to grant access.
2. Click the **Selerix Engage** icon  at the upper right corner of the screen.



Your Profile

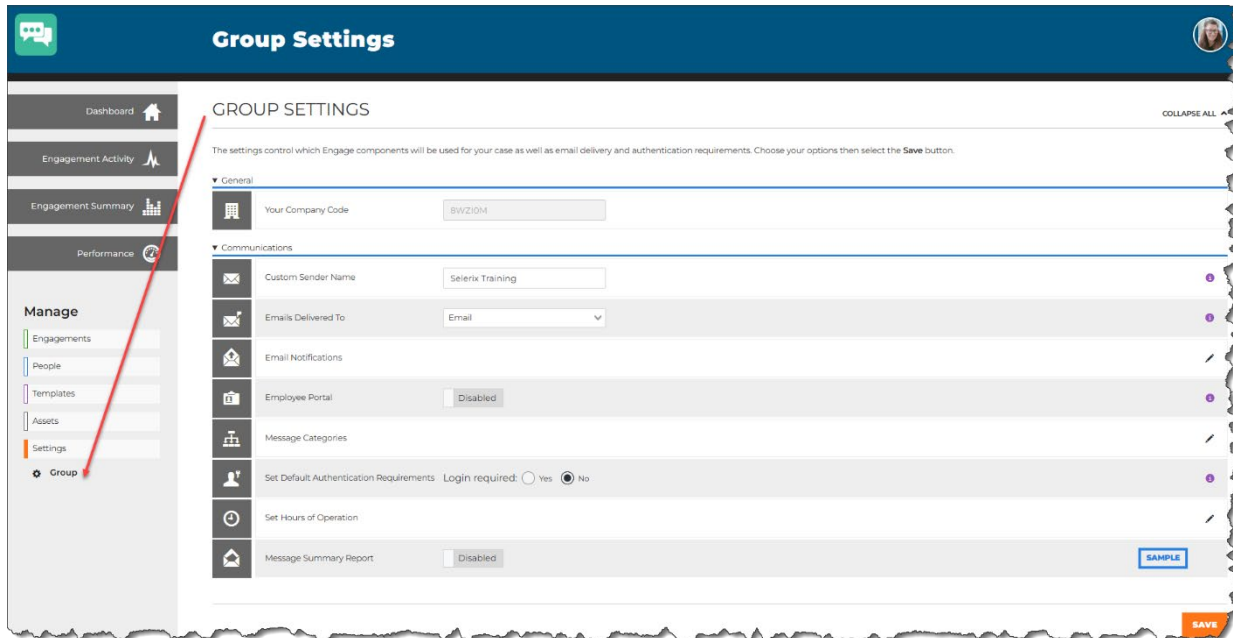
Access your profile in the upper right corner of your Selerix Engage screen. Your profile allows you to

1. Upload a profile picture. Please see the image guidelines.
2. Select your time zone. Selecting your time zone will not affect your engagement’s deployment time. Engagements deploy based on the recipient’s time zone.
3. Select your homepage. You have the option of selecting your Selerix Engage homepage. You can select from these options:
 - **Engagement Dashboard** – select the view you want (e.g., Daily, Weekly, Monthly)
 - **Engagement Activity** – select the view you want (e.g., Daily, Weekly, Monthly)
 - **Engagement Summary**
 - **Performance**



Group Settings

Before deploying communications, be sure to set your case’s global settings appropriately. View and adjust group settings for your case by clicking the Group link under Settings on the left-hand side of the page.



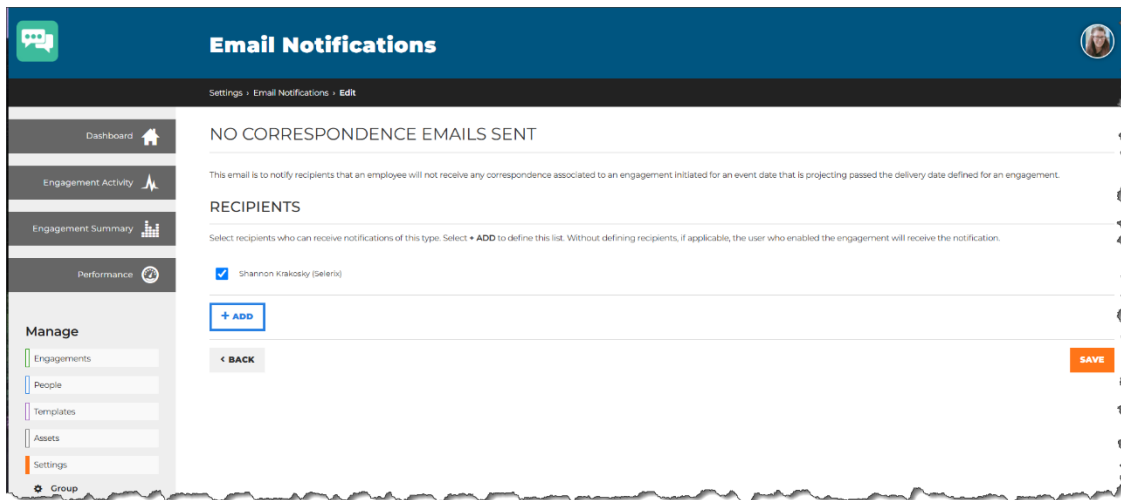
Your Company Code – this code is unique to your case and cannot be changed. You will provide it to employees who are having trouble logging into the Selerix Engage employee portal.

Custom Sender Name – emails deployed using Selerix Engage will come from the do-not-reply@benselect.com email address. If required by your organization, this email should be white listed. You have an opportunity to add a custom sender name to the email address to make your communications more recognizable to employees. For example, “Custom Sender Name <do-not-reply@benselect.com>.” The default custom sender name is Selerix Engage if it is not changed.

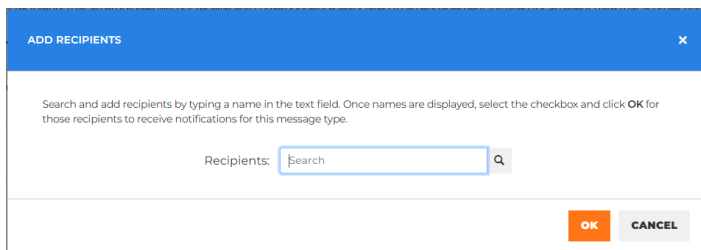
Emails Delivered To – you can select what employee email address to use for email delivery. Your options are:

1. **Email** – this option will deliver to the primary email address stored in your employee data.
2. **Personal Email** – this option will deliver to the employee’s personal email address if stored in the employee data.
3. **Both** – this option will deliver to both the primary and personal email addresses.

Email Notifications – when using event-driven communication, you can designate the individual in your organization who will receive notifications if a targeted recipient fails to receive a communication. Click on the Pencil icon to add a fallback recipient.

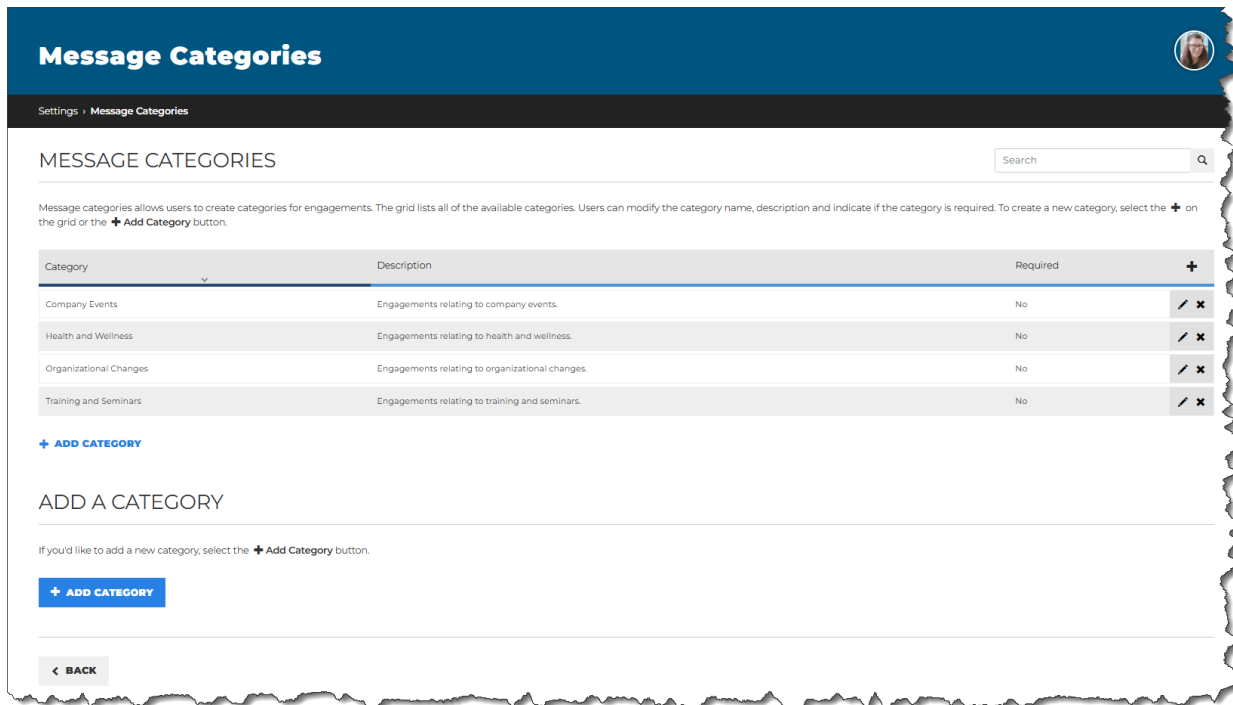


Click the **Add** button to search for an administrative user, select the user and then click **OK**.



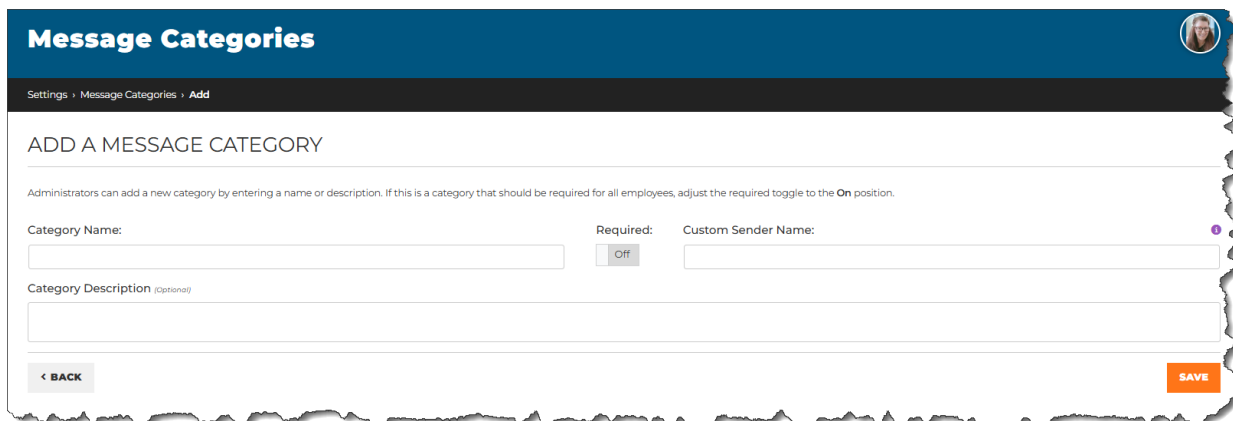
Employee Portal – the Selerix Engage employee portal gives you another way of communicating with your employees via the desktop and mobile browser. Toggle to activate the portal.

Message Categories – Selerix Engage give you an opportunity to assign message categories to your communications. In addition to the included categories – Company Events, Health and Wellness, Organizational Changes, and Training and Seminars.



To add custom categories, click the Add Category button:

1. Enter the category name.
2. Indicate if the category is required, meaning employees cannot opt out of this category.
3. You can use a custom sender name for any category which can be helpful if different areas in your organization are using Selerix Engage to deploy communications to employees.
4. Including a description is optional but recommended.
5. Click **Save** when you are finished.



Set Default Authentication Requirements: Login Required – This setting dictates whether employees will need to log into the Selerix Engage Employee Portal to read their messages. Unless you will be deploying protected information, Selerix recommends setting to “No.” You can change the setting to “Yes” on an individual engagement basis.

Set Hours of Operation – Entering your organization’s hours of operation is important if you will be deploying event-driven communication. These are communications that deploy based on an event happening such as a newly hired employee being added to the employee database. Often, these updates occur late at night or on weekends. Selerix Engage will “hold” those communications until your hours of operation begin the following business day.

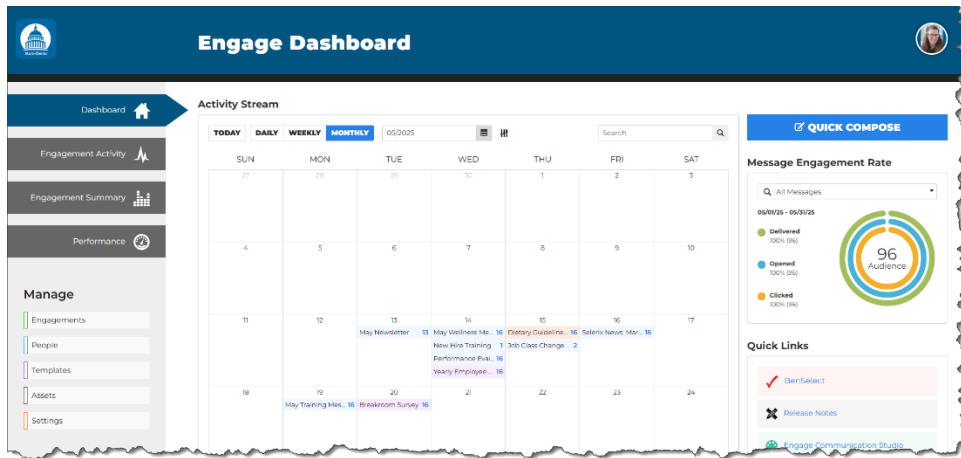
Remember to click on the **Save** button once you’ve made your selections.

Chapter 2: The Engage Dashboard

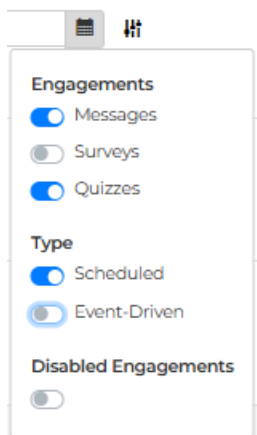
Selerix Engage displays the Engage Dashboard when you login. This Dashboard provides a centralized view of all engagements using the “**Activity Stream**”. Message creation is simplified with the **Quick Compose** feature, which allows you to easily select the audience and send out a message in just a few steps. You also have a quick view into some basic **Engagement Metrics**, as well as Quick Links for basic guidance.

Using the Activity Stream

The Activity Stream allows you to view engagements by a day, weekly, or monthly view. Simply click on the type of view wanted and locate the desired engagement.

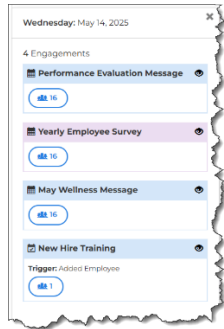




You can also filter by types of Engagements. Use the Filter icon to show the types of Engagements for a selected timeframe.



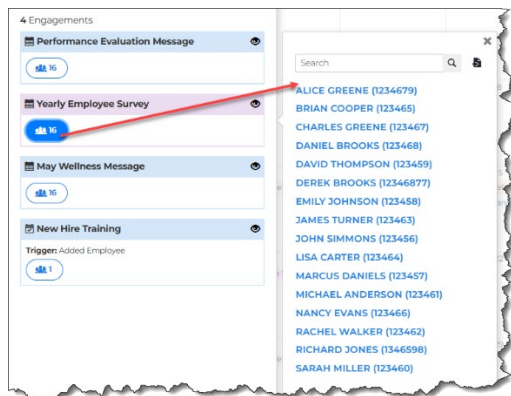
Viewing Engagements


If you click on a date that has multiple engagements, you can use the expanded side panel to see the engagements occurring on that date.



Message Type Hover over the engagement icon to the left of the engagement's title to identify the type of engagement, for example Event Driven  or Scheduled .

Audience Click on the Audience icon  to view a list of employees who received the message; this list is also searchable if needed.

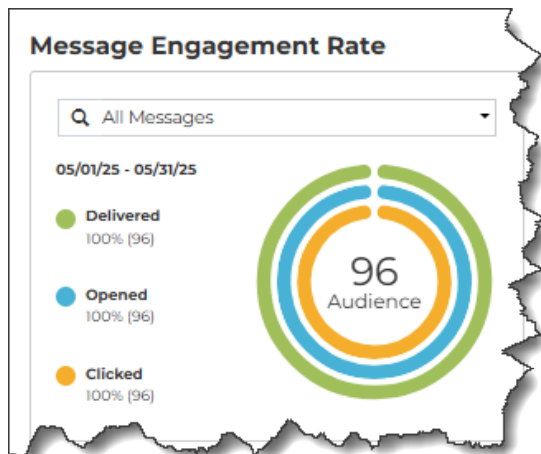


Click on the Export icon  to download a file containing both Successes and Failures. The file will show Opens and Clicks on the Success tab, and Failure Reasons and Delivery Attempts on the Failed tab.

Understanding Message Engagement Rates

The **Message Engagement Rate** widget displays overview statistics for a specific time period (based on the Activity Stream view). It shows the following:

- Delivered – total number of messages delivered
- Opened – total number of messages opened
- Clicked – total number of messages clicked



Note: This widget is ONLY for Messages, not Surveys or Quizzes.

Using Quick Compose

Quick Compose provides a more efficient way to quickly compose and send simple messages. You can assign a message name, set a delivery date and time, select or import an audience, select the type of message, and then compose your message. You can always choose to continue the message in the newly designed **Message Editor** if you need additional assistance.

QUICK COMPOSE ✕

Set necessary details like message name, delivery date, time, and audience. Check off the message delivery type(s), such as **App Message**, **Email**, and/or **SMS/Text**, visit each one and compose the message. Select **Send** when done.

Message Name:

Delivery Date:
Delivery Time:

Audience: All Active Employees

IMPORT

Email >

Text/SMS >

Feed >

Select delivery type to begin your message.

CONTINUE IN EDITOR
AUDIENCE TEMPLATE

SEND
CANCEL

Composing a Quick Message

Follow these steps to quickly craft a message to your specified audience.

Step 1 – Message Name

Enter a Message Name – this displays on the Activity Stream, as well as in **the Engagements >> Manage >> Message** view.

Message Name:

Prep for the 4th Quarter

Step 2 – Delivery

Set the Delivery Date and the Delivery Time. This message is saved as a scheduled message.

Delivery Date:

Delivery Time:

09/29/2025



09:00 AM



Step 3 – Select the Audience

You can choose from using All Active Employees, searching for an existing global audience or importing one using the Audience Template.

First, download the template using the Audience Template download button.

↓ AUDIENCE TEMPLATE

Be sure to include either the SSN or EIDs for each employee to accurately match their employee record.

Note that importing audiences into the Quick Compose editor does not save the audience for other engagements.

Click **IMPORT**, then select the Audience to upload. Click **UPLOAD** to import the audience.

Audience: All Active Employees

SEARCH Q

Choose File

TestC...us.xlsx

UPLOAD

Step 4 – Select the Message Type

Select email, text, and feed notification based on your communication needs. Each editor displays to the right and provide editing options specific to that message format.

Email >

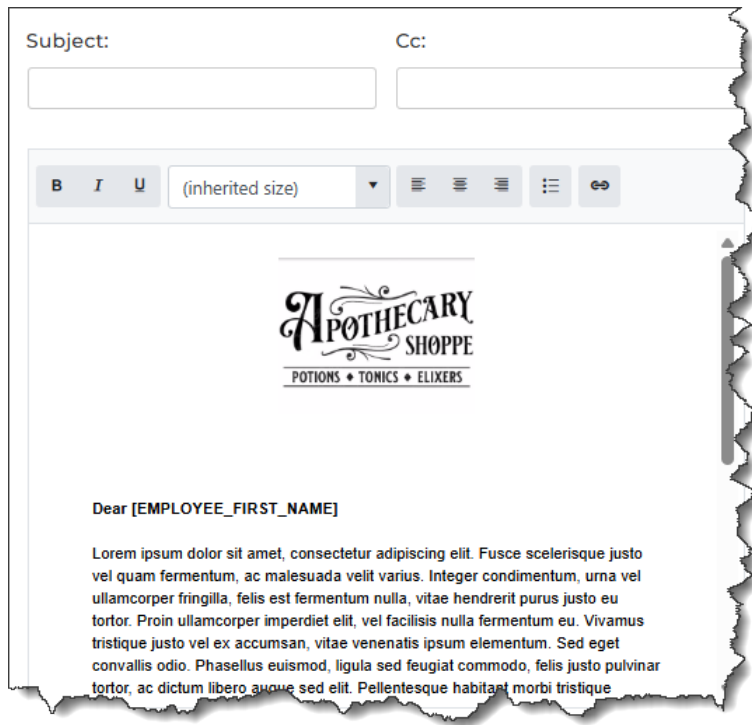
Text/SMS >

Feed >

Step 5 – Message Composition Area

Use the Message Composition area to compose your message.

Et ZHkEc|s7q Ac c s9dRt a3db5Cb l0n0d0c d0c 0Z7mW drrZf d0ejd Zsshtf 9Z7c w7jt q t drrZf d0c



You can always choose to do more in-depth editing/audience selection by clicking the

Continue in Editor button.

CONTINUE IN EDITOR

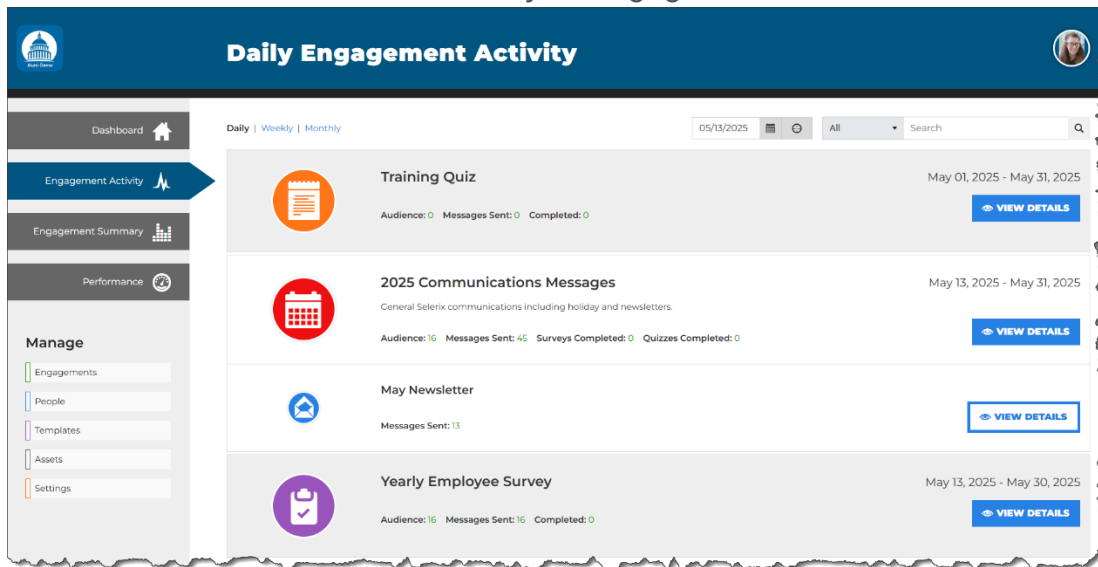
You must have already provided a Message Name, Delivery Date and Delivery Time to go to the Messages >> Manage > Edit page.

Chapter 3: Performance Metrics

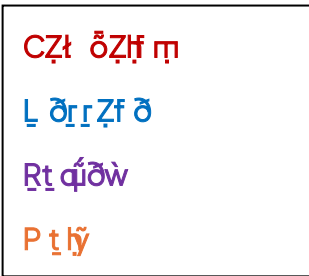
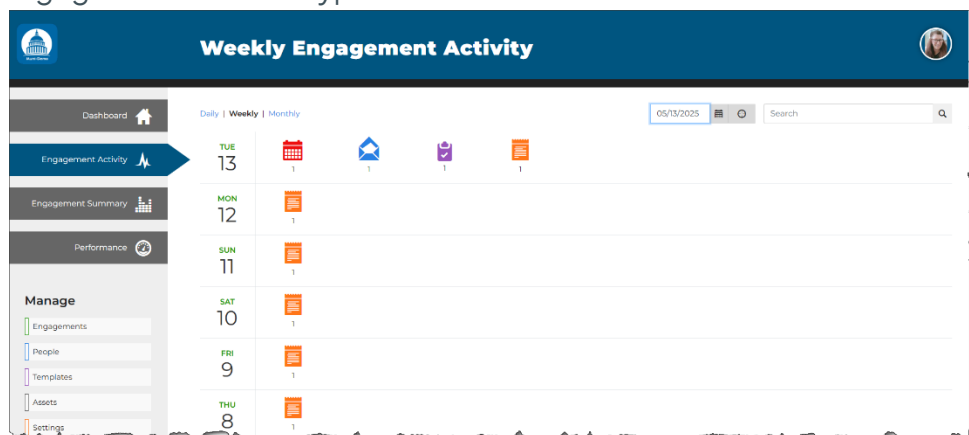
Engagement Activity Page

The Engagement Activity page provides details on all active engagements on a daily, weekly or monthly basis. You can also search activity on a historical basis by selecting the date in the upper right-hand corner of the page. Use the combination of date and search bar to make your search more specific.

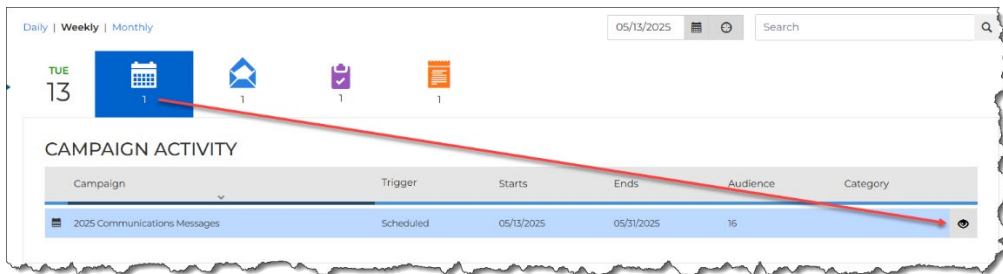
1. **Daily view** – This view shows all active engagements for the current day. Click the **View Details** button to see detailed information on your engagement.



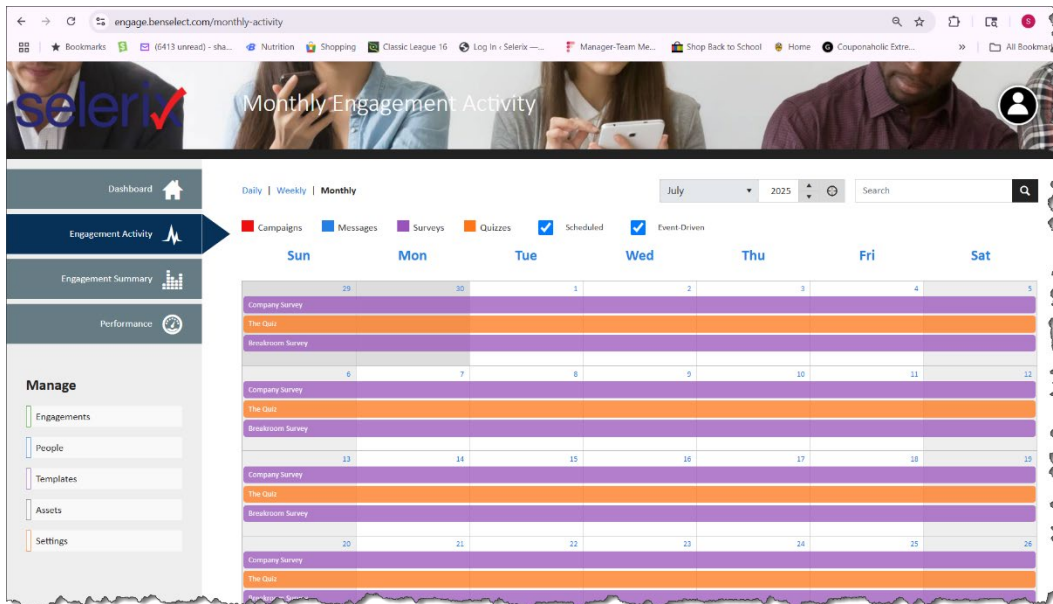
2. **Weekly view** – This view shows all active engagements for the current day and the previous six days if any engagements were active. Icons represent different engagement types you can create, and the number beneath each one shows how many instances of that type were active on that specific day. Click an icon to show a list of active engagements for that type.



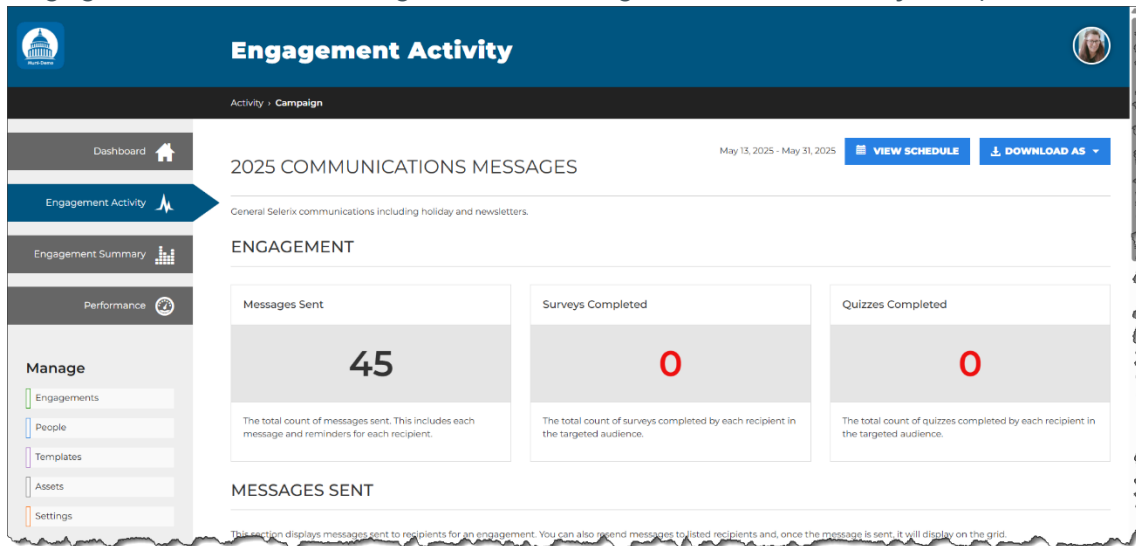
Click on the View icon to the right of each engagement to view details.



- Monthly view** – This view shows all active engagement for the current month. Use the boxes at the top of the page to view all or just some of the engagements either scheduled, event-driven or both. Click on the engagement to see detailed information on your engagement. See View Details below for more information.

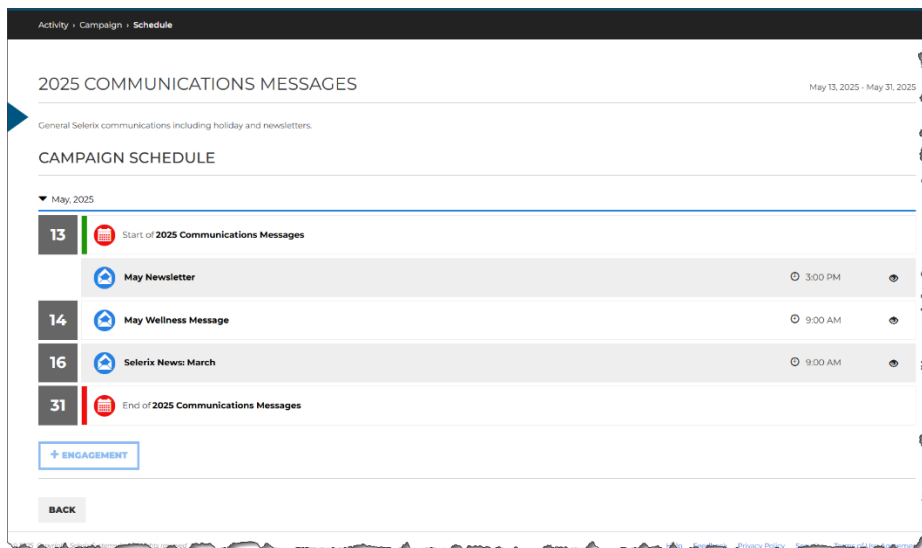


View Details – Click the View Details button or the View icon to open the View Details page for your engagement such as messages sent, message failures and surveys or quizzes completed.



Buttons on the page include:



View Schedule (for Scheduled Engagements only) – Click this button to view the dates for the type of engagement selected. The Name of the engagement and deployment date are also displayed.



You can use the +Engagement button to add a new engagement.


Download As – Click this button to select how to download the details of the engagement.











Messages Sent section – This section shows a table list of all employees who have successfully received a message. The table includes the following columns:

1. **Name** – recipient name.
2. **Delivered on** – date and time the individual received the engagement.
3. **Opened** – shows yes or no depending on the individual opening the message.
4. **Clicked** – shows yes or no depending on the individual Click a link within the message.
5. **Reminders** – shows the number of reminders the individual received.
6. The final column contains a Resend button  and a View icon . The Resend button will resend the original message to the individual. The View icon will open a page with specific information on the individual such as email address, mobile number and the version of the message he or she opened or clicked. Scroll to the bottom of the page to click the Resend Message button.
7. You can also search employees by name.

Messages Sent

This section displays messages sent to recipients for an engagement. You can also resend messages to listed recipients and, once the message is sent, it will display on the grid.



Name	Delivered On	Opened	Clicked	Reminders	
[Redacted]	04/28/2023 1:00 PM CST	Yes	No	0	 
[Redacted]	04/28/2023 1:00 PM CST	Yes	Yes	0	 
[Redacted]	04/28/2023 1:00 PM CST	Yes	No	0	 
[Redacted]	04/28/2023 1:00 PM CST	Yes	Yes	0	 
[Redacted]	04/28/2023 12:00 PM CST	Yes	No	0	 

<< < 1 2 3 4 5 ... > >>

Messages Failed section – This section shows a table list of all individuals who failed to receive the message. The table includes the following columns:

1. The first column includes an icon representing the type of engagement that failed.
2. Name – shows the name of the intended recipient.
3. Message – shows the name of the engagement.
4. Delivery Attempt – shows the date and time of the message’s attempted delivery.
5. Reason – provides a reason for the delivery failure.
6. The final column contains a View icon. When clicked, you will see a more detailed reason for the delivery failure.

Messages Failed 51

	Name	Message	Delivery Attempt	Reason	
	[Redacted]	Selerix News: April	04/28/2023 1:00 PM CST	Email got dropped.	
	[Redacted]	Selerix News: April	04/28/2023 11:01 AM CST	The destination number is unable to receive this message. Potential reasons could include trying to reach a landline or, in the case of short codes, an unreachable carrier.	
	[Redacted]	Selerix News: April	04/28/2023 11:00 AM CST	Incorrect Phone Format.	
	[Redacted]	Selerix News: April	04/28/2023 11:00 AM CST	Incorrect Phone Format.	
	[Redacted]	Selerix News: April	04/28/2023 11:00 AM CST	Incorrect Email Format.	

« ‹ 1 2 3 4 5 ... › »

Quizzes Completed section (if applicable) – This section shows a table list of the individuals who have completed the quiz. The table includes the following columns:

1. Name – shows the name of the individual.
2. Completed on – shows the date and time the individual completed the quiz.
3. Passed – shows yes or no depending on the individual’s performance on the quiz.
4. Score – shows the individual’s final score based on his or her performance.
5. The final column contains a View icon. When clicked, you will see the individual’s answers to the quiz questions.

Quizzes Completed

Name	Completed on	Passed	Score	
No Quizzes found.				

Surveys Completed

Name	Completed on	
No Surveys found.		

Surveys Completed section (if applicable) – This section shows a table list of the individuals who have completed the survey. The table includes the following columns:

1. Name – shows the name of the individual. However, if you created an anonymous survey, you would see the word “Anonymous” in this column.
2. Completed on – shows the date and time the individual completed the survey.
3. The final column contains a View icon. When clicked, you will see the individual’s answers to the survey questions. Again, if you created an anonymous survey, you will see the word “Anonymous.”

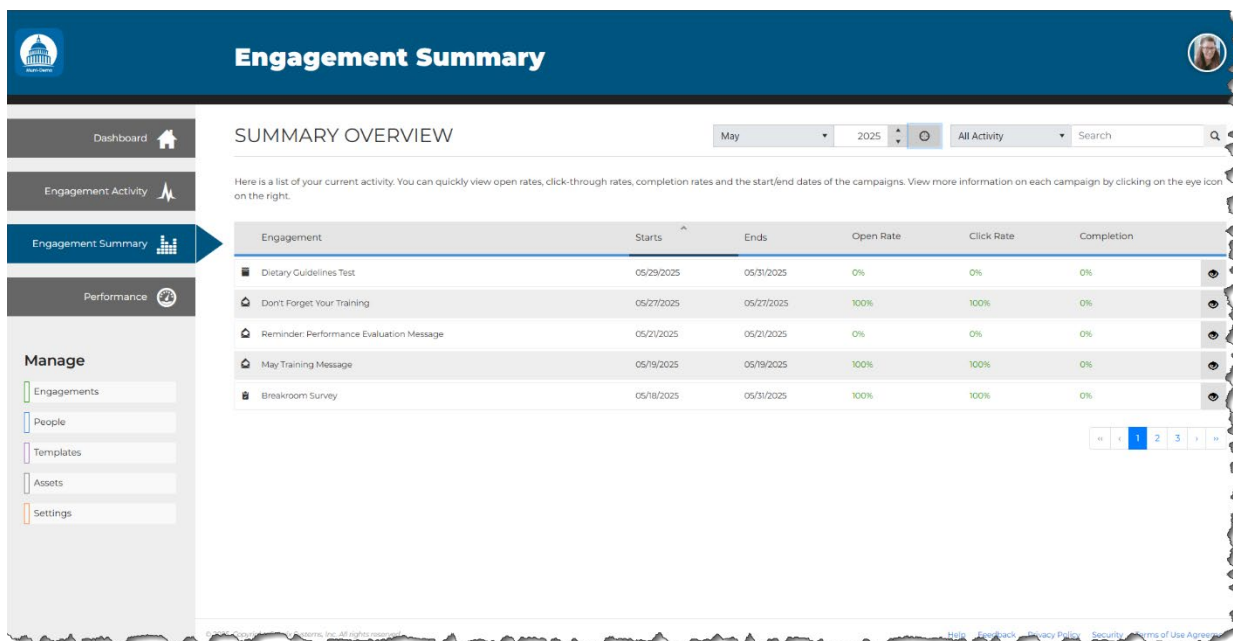
To see a summary of how your employees answered your quizzes and surveys overall, go to the [Overall Quiz Score](#) section in this user guide.

Engagement Summary Page

The Engagement Summary page provides a high-level overview of your engagements' performance. The page contains a table with a list of your active engagements for the current month. The table contains the following columns.

1. The first column contains an icon representing the type of engagement.
2. Engagement column – shows the name of your engagement.
3. Starts and Ends columns – show the start and end date of your engagement.
4. Open Rate column – shows the actual open rate for your engagement.
5. Click Rate column – shows the actual click rate for your engagement.
6. Completion column – shows the completion rate for both surveys and quizzes.
7. Clicking the View icon in the last column will show more details of your engagement's performance.

You can change the month and year of your summary, as well as search engagements by name in the upper right portion of the screen.



Performance Page

The Performance Page provides detailed metrics on all your deployed engagements. The metric goals that you set when creating your engagements are compared to the actual performance to determine the letter rating of A, B or C.

The page defaults to the last 30 days; however, you can select any date range you'd like to see.

The page is divided into three sections:

1. **Overall Engagement Rating** – a rating for ALL deployed engagements.
2. **Engagement Ratings by Type** – a rating assigned by deployed engagement type.
3. **Performance Breakdown** – a rating for EACH deployed engagement. View greater detail of your engagements by clicking the icon in the last column of table. In the case of quizzes and surveys, clicking the icon will show you a tabulation of how your employees answered your surveys and quizzes.

Calculating Your Ratings:

Selerix Engage compares the metrics goals you set when creating your engagements to the actual open, click and completion rates. The letter rating is determined by the following ranges:

1. A – 90% to 100%
2. B – 80% to 89%
3. C – 1% to 79%
4. N/A – 0%

The screenshot displays the 'Performance' section of the Selerix Engage interface. At the top, there is a dark blue header with the word 'Performance' in white and a user profile picture on the right. Below the header, the main content area is titled 'OVERALL ENGAGEMENT RATING'. To the right of this title, there is a date range selector showing '05/12/2025' to '07/31/2025'. The central focus is a large green circle containing a white letter 'A', indicating the overall rating. Below the rating, there is a timestamp: 'Last Updated 06/06/2025 3:05 AM CST'. At the bottom right, a legend defines the rating ranges: 'A: 90%-100%, B: 80%-89%, C: 1%-79%, N/A: 0%'. On the left side of the main content area, there is explanatory text: 'The overall engagement rating is a measurement of all your engagement activity. Through a comprehensive formula, Selerix Engage uses performance metrics like open, click and completion rates to calculate the Overall Engagement Rating. There is no need to interpret the numerical rating because Selerix Engage then takes the rating and assigns an easy-to-understand letter grade of A, B or C based on pre-determined ranges. Users can track their rating over time to gauge the effectiveness of their communication efforts.'

Average Metrics:

AVERAGE OPEN RATE is a mathematical average of the open rate for each deployed engagement in the selected date range.

AVERAGE CLICK RATE is a mathematical average of the click rate for each deployed engagement in the selected date range.

AVERAGE COMPLETION RATE is a mathematical average of the completion rate for each deployed survey or quiz in the selected date range.

Performance Metrics:

These numbers are based on the goals you set for each engagement—they help you see how things are going compared to what you planned."

PEN RATE AS OF % OF GOAL is calculated by dividing the actual open rate by the open rate goal set when an engagement is created. It shows how your actual open rate compares to the set goal.

CLICK RATE AS % OF GOAL is calculated by dividing the actual click rate by the click rate goal set when an engagement is created. It shows how your actual click rate compares to the set goal.

COMPLETION RATE AS OF % OF GOAL is calculated by dividing the actual completion rate by the completion rate goal set when a survey or quiz is created.

ENGAGEMENT RATINGS BY TYPE

This section shows performance data for each type of engagement within a specific time period. It includes a count of engagement types, averages for click, open and completion rates and how those averages compare to set goals. Click on the information icon for more information on each metric type.

Metric	Average	% of Goal
Open Rate	100%	100%
Click Rate	100%	100%

Metric	Average	% of Goal
Open Rate	100%	100%
Click Rate	100%	100%

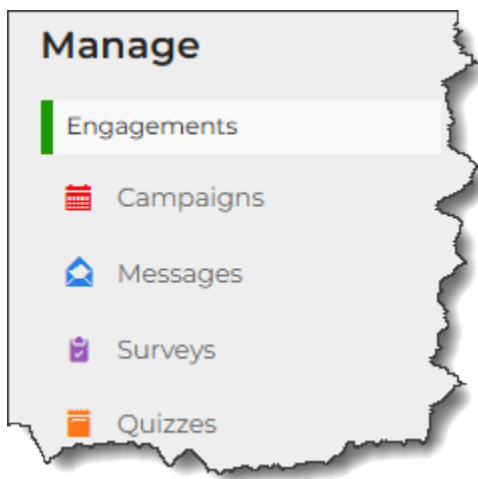
Metric	Average	% of Goal
Open Rate	33%	100%
Click Rate	33%	100%

Metric	Average	% of Goal
Open Rate	71%	100%
Click Rate	71%	100%

Chapter 4: Creating Engagements

You can create the following scheduled or event-driven engagements via the Manage section:

1. **Campaigns** – these engagements take place over a period of time and can include messages, survey and quizzes. Best to use when you want to deploy multiple, supportive, engagements.
2. **Messages** – these engagements deploy once on either a scheduled or event-driven basis.
3. **Surveys** – these engagements deploy once and can be designed to receive feedback from employees.
4. **Quizzes** – these engagements deploy once and can be designed to test employee knowledge.
5. **Event Driven Engagements** – these engagements can be triggered by a particular event (birthday, anniversary, etc.) and can be any of the four previous engagement types.
6. **Engagement Templates** – use these as a starting point for an engagement. Templates are a good time saver, especially if you are new to Engage and need some ideas to get started. These can be utilized when building any kind of engagement.






Campaigns

Click **Campaigns** under the **Engagements** section to open the **Manage or Create Campaigns** page. Existing campaigns display in the table—you can scroll through pages or use the search bar to find a specific one.

CAMPAIGN TABLE OVERVIEW

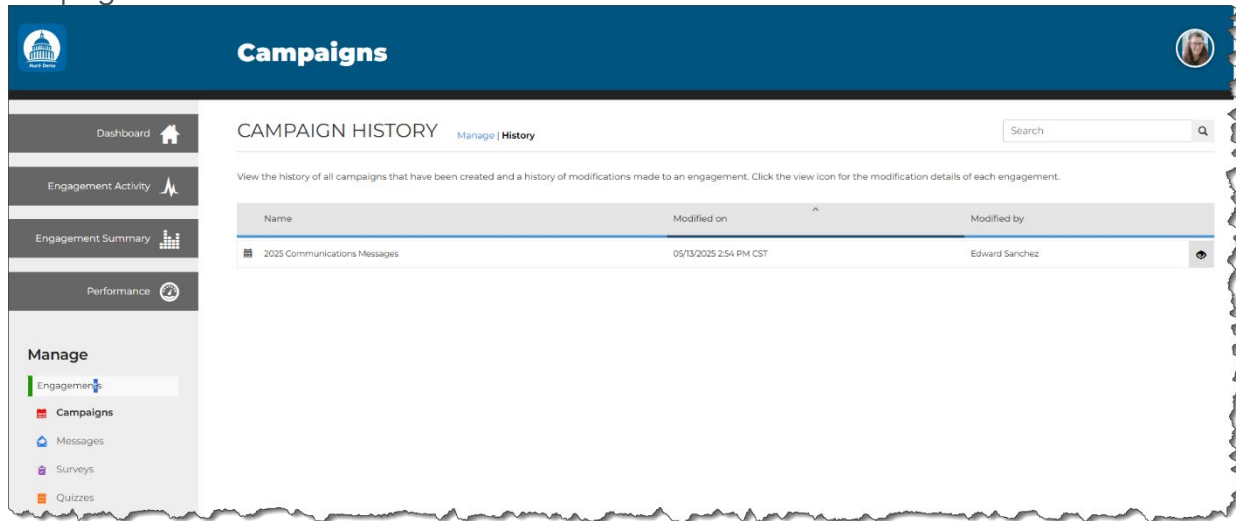
Column	Contents	Details
Type	Campaign Type	Displays an icon for Scheduled or Event-Driven campaigns.
Title	Campaign Name	Shows the name/title of the campaign.
Trigger	Activation Method	Indicates whether the campaign is Scheduled or triggered by an event (e.g., New Hire).
Start Date	Launch Timing	The date the campaign begins.
End Date	Completion Timing	The date the campaign ends.
Status	Enabled/Disabled	Shows whether the campaign is currently active or inactive.
Actions	Interaction Options	Includes icons and menu options for managing the campaign.

COLUMN 7: ACTIONS EXPLAINED

-  **Pencil Icon** – Appears when the campaign is **disabled**. Click to edit the campaign.
-  **View Icon** – Appears when the campaign is **enabled**. Click to view the campaign in **read-only** mode.
-  **Ellipsis Menu** – Opens additional options:
 - **Copy** – Duplicates the campaign with its current type (Scheduled or Event-Driven).
 - **Copy As** – Duplicates the campaign and lets you change its type.
 - **Download** – Exports the campaign to your download folder for use in another case.
 - **Engagement Activity** – View detailed engagement metrics (see Engagement Activity section).
 - **Engagement Summary** – View a summary of engagement performance (see Engagement Summary section).

Viewing Campaign History

Click the **History** link at the top of the page to display a table list of all the campaigns you have created. You can scroll through each page to find a campaign or use the search bar at the top of the page.



📄 CAMPAIGN HISTORY OVERVIEW

Column	Contents	Details
Type	Campaign Type	Displays an icon for Scheduled or Event-Driven campaigns.
Title	Campaign Name	Shows the name/title of the campaign.
Modified on	Last updated	The date and time the campaign was last modified.
Modified by	User name	The name of the user who modified the campaign.

Creating New Campaigns

To create a new campaign, begin by clicking **+ Add Campaign**. You can also copy an existing campaign or import a campaign from another case or source. See the [Copying a Campaign](#) or [Importing a Campaign](#) sections.


ADD CAMPAIGN
×

To start building a campaign, select between a new campaign or starting from a template. Campaign titles are for reference only and not displayed to employees. When starting from a template, it pre-selects the campaign type, but this can be simply modified by selecting a different type icon.


From:

Title:

Choose between a **Scheduled** ⓘ or **Event-Driven** ⓘ campaign.



Scheduled



Event-Driven

Creating a New Campaign “from Scratch”

Step 1 – Create New

Select Create New in the From drop-down list.

Give the campaign a title and indicate if it is scheduled or event driven. Click **OK**.

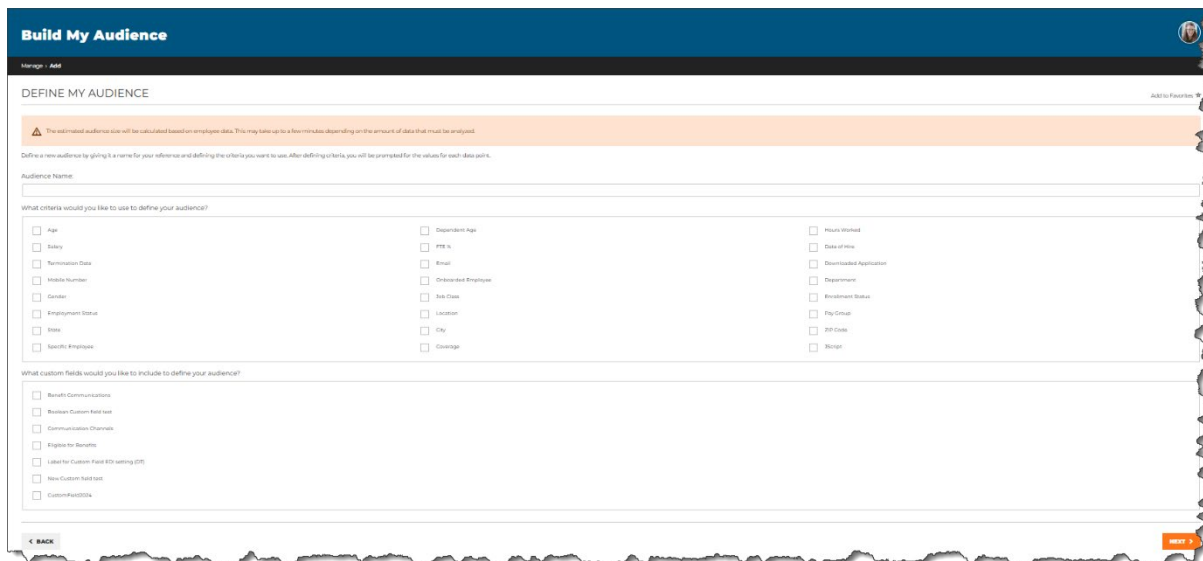
Step 2 – Getting Started

Enter start and end dates, select a category (optional), and enter a campaign description (optional).

If you selected Event-Driven, select the Event Trigger and Trigger Date, and then click **Next**. The Event Date uses a defined event date field, while the Processing Date uses the date that the record is entered into the system.

Step 3 – Build My Audience

You can choose to send to all active employees by toggling on the **All Active Employees** button. Click the **Global Audience** button to add a global audience (accessible to all engagements) or create a new custom audience. The Audience window will open. You will see a list of available global audiences from which to select or click the **Create Custom Audience** button to create a custom audience. Clicking the **Define My Audience** button will open the Define My Audience page.



1. Give your custom audience a name.
2. Select the criteria you will use to define the custom audience.
3. If you want to use a custom field to define an audience, select the custom field.
4. Click the **Next** button.
5. You can make the custom audience a global audience (see [Building a global audience](#)) by toggling the global button to Yes.
6. Click the **Next** button to define the criteria.
7. Click the **Define** button.

Step 4 – Adding Surveys, Quizzes and Messages

Decide what type of engagements you will add to your campaign.

1. **Survey** – Click the + Survey button to create a new survey or the import button to import an existing survey. For steps on creating a new survey, please see the Creating a Survey section. If you won't be adding a survey, click **More**.
2. **Quiz** – Click the + Quiz button to create a new quiz or the import button to import an existing quiz. For steps on creating a new quiz, please see the Creating a Quiz section. If you won't be adding a quiz, click **More**.
3. **Message** – Click the + Message button to create a new message or the import button to import an existing message. For steps on creating a new message, please see the Creating a Message section. If you won't be adding a message, click **More**.

Step 5 – Setting Open, Click and Completion Rate Goals and Business Goals

Setting goals is a great way to measure engagement performance. Use the sliders or the Pencil icon to set goals for open, click and completion rates then click next.

Click the + Goal button to add business goals. Enter your business goal information and click OK.

Step 6 – Almost Done

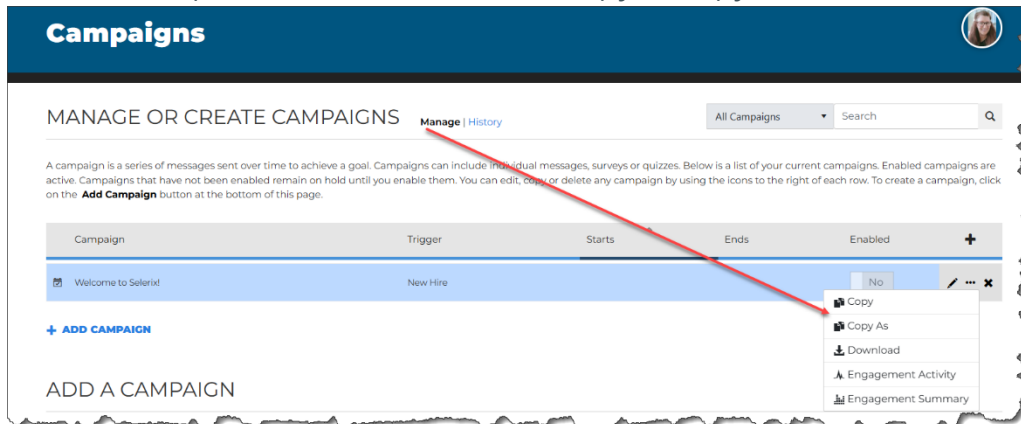
You can enable the campaign if it is ready to deploy or save the campaign as disabled if it is not ready to deploy.

Copying a Campaign

You can easily copy an existing campaign from the Manage page.

To copy a campaign:

1. Display the campaign you want to copy on the Campaigns >> Manage page.
2. Select the ellipsis and then select either Copy or Copy As.



3. Selecting **Copy** will copy the campaign “as is.” Selecting **Copy As** allows you to change a scheduled campaign to an event-driven campaign or vice versa. The entire campaign will open on one page, and you will need to do the following:
 - a. Enter new start and end dates.
 - b. Select or create a new audience.
 - c. Enter new delivery dates and times for the campaign components.
4. Click **Save** to save your campaign.

Importing a Campaign

Importing a campaign is a two-step process. First, you will need to export the campaign from the case where it was created (case 1). Second, you will need to log into the case in which you want to use the campaign (case 2) to import it.

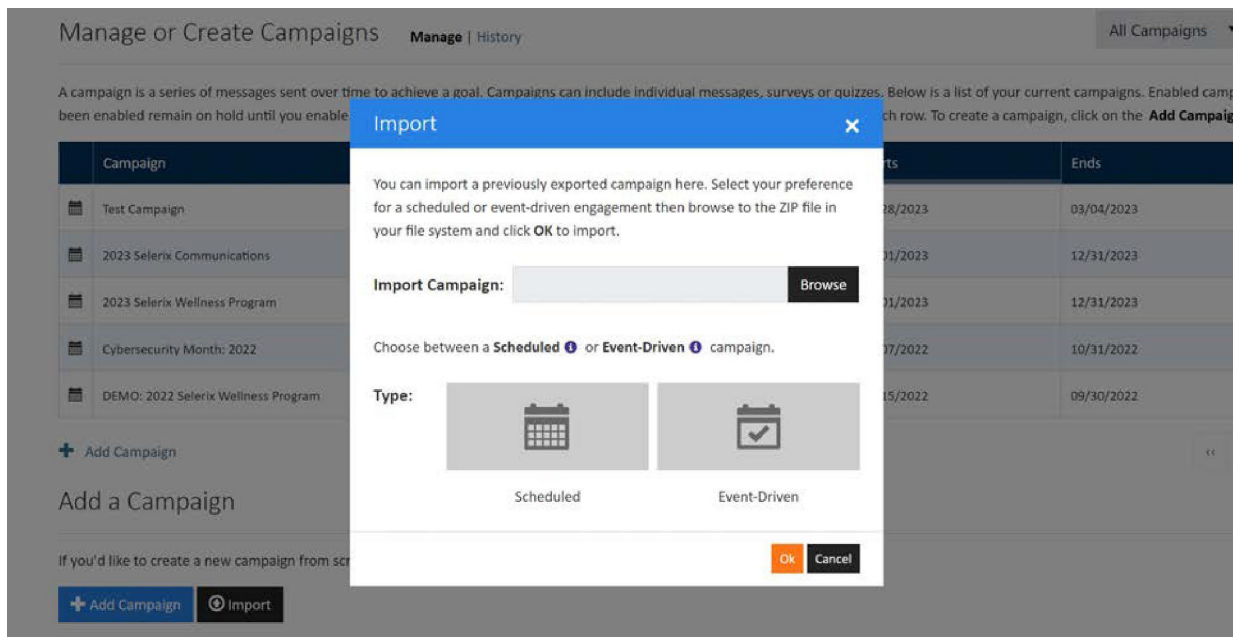
Step 1

Log in to the case in which the campaign was created. From the Manage or Create Campaigns page, select the ellipsis for the campaign you'd like to export and select Download.

Step 2

Log in to the case in which you want to use the campaign and click on the Import button. Next, click Browse to find the downloaded campaign. After selecting the downloaded campaign, select Scheduled or Event-Driven and click OK. The entire campaign will open on one page, and you will need to do the following:

1. Enter new start and end dates.
2. Select or create a new audience.
3. Enter new delivery dates and times the campaign components.
4. Enter new performance goals.





Messages

Click **Messages** under the **Engage** section to open the **Messages** page. Existing Messages display in the table—you can scroll through pages or use the search bar to find a specific one.

MESSAGES TABLE OVERVIEW

Column	Contents	Details
Type	Message Type	Displays an icon for Scheduled or Event-Driven message.
Message	Message Name	Shows the name of the message.
Trigger	Activation Method	Indicates whether the message is Scheduled or triggered by an event (e.g., New Hire).
Valid From	Timeframe	For event-driven messages, the start date.
Valid To	Timeframe	For event-driven messages, the end date.
Deliver On	Delivery Date	The Deliver On information (dates for scheduled messages and plus days/time for event-driven messages).
Status	Enabled/Disabled	Shows whether the campaign is currently active or inactive.
Actions	Interaction Options	Includes icons and menu options for managing the campaign.

COLUMN 7: ACTIONS EXPLAINED

-  **Pencil Icon** – Appears when the message is **disabled**. Click to edit the campaign.
-  **View Icon** – Appears when the message is **enabled**. Click to view the campaign in **read-only** mode.
- **Ellipsis Menu** – Opens additional options:
 - **Copy** – Duplicates the message with its current type (Scheduled or Event-Driven).
 - **Copy As** – Duplicates the message and lets you change its type.
 - **Download** – Exports the message to your download folder for use in another case.
 - **Engagement Activity** – View detailed engagement metrics (see the [Engagement Activity](#) section).
 - **Engagement Summary** – View a summary of engagement performance (see the [Engagement Summary](#) section).

Creating New Messages

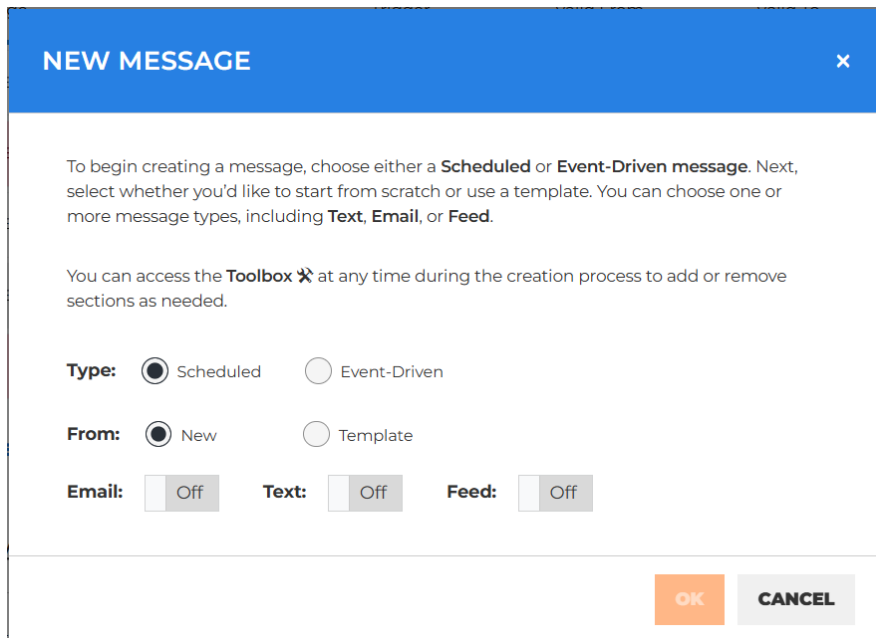
To create a new message, begin by clicking **+ Add Message**. You can also copy an existing message or import a message from another case or source. See the [Copying a Message](#) or [Importing a Message](#) sections for more information.

The new workflow for creating messages is intended to streamline and simplify the message composition process. Creating a message now takes fewer steps, with all content creation on the same screen.

Step 1 – Create New

From the Manage or Create Message page, click **+ Add Message**.

The New Message dialog box provides options for creating the message.



NEW MESSAGE ✕

To begin creating a message, choose either a **Scheduled** or **Event-Driven message**. Next, select whether you'd like to start from scratch or use a template. You can choose one or more message types, including **Text**, **Email**, or **Feed**.

You can access the **Toolbox ✕** at any time during the creation process to add or remove sections as needed.

Type: Scheduled Event-Driven

From: New Template

Email: Off **Text:** Off **Feed:** Off

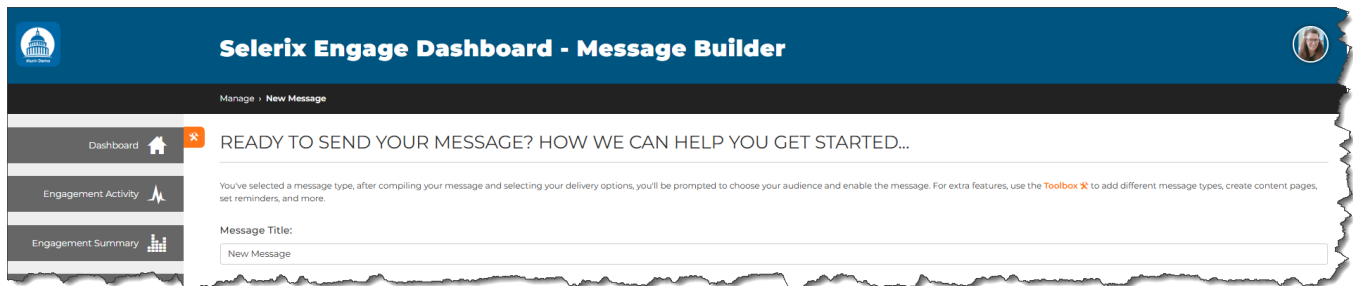
OK **CANCEL**

Step 2 – Select Options

1. Select the Type of trigger for the message – **Scheduled** or **Event-Driven**.
2. Select the From method – **New** (from scratch) or **Template**.
3. Select the types of messages you want to create – **Email**, **Text** or **Feed**.
4. Click **OK**.

Note: The following steps use Email, Text, and Feed for message composition. You do NOT have to select all three, just the one(s) you want to use.

The Message Builder page opens, with all the options you need to create a basic message.



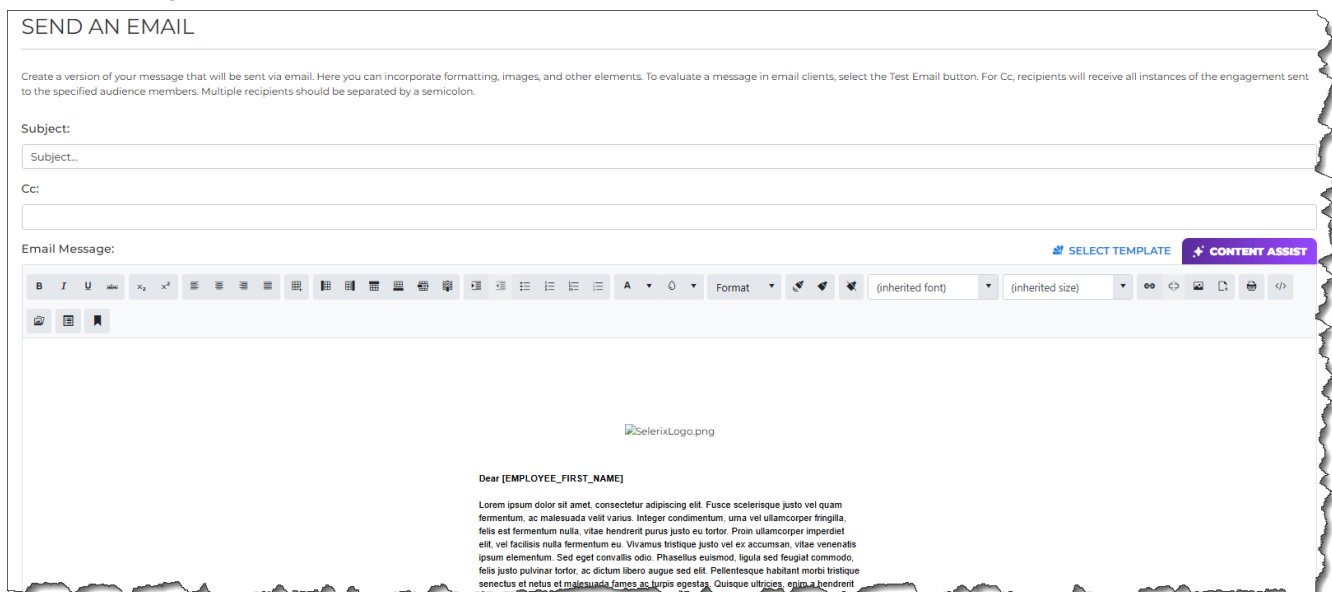
Step 3 – Name Your Message

Enter the Message Title.

Step 4 – Creating the Email Version of Your Message

Enter the subject of your email followed by the body of the email:

1. Enter content directly into the email editor using the available editing tools.
2. Click on the HTML editor button to open the HTML editor. You can then paste your HTML code into the editor. After entering the HTML, click on the T button for a preview of the content page.
3. Click **Content Assist** to use the Selerix AI partner to help you compose your message. See the [Using Content Assist](#) section for details.



Step 5 – Creating the Message Feed version of your message

The message feed message will be displayed in the message feed section of the Selerix Engage Employee Portal (see the Selerix Engage Employee Portal section). Enter the title of the message followed by the message. A preview of the message is shown.

Content Assist is also available for help in message creation, although you cannot upload a file.

SEND A MESSAGE TO THE FEED

Create a message that will be displayed in the message feed. If a content page has been created, this message will automatically be linked to that content page.

Title:

Message: CONTENT ASSIST

Preview:

QC Enrollment
Discover the latest offerings from Selerix Go to Selerix.com/training to learn more and stay updated!

Step 6 – Creating the Text Message version of your message

Enter your text message in the text message window. Text messages are limited to 280 characters. A preview of the text message is shown.

Content Assist is also available for help in message creation, although you cannot upload a file.

SEND A TEXT MESSAGE

Create the SMS/text message version of your message. You can preview your text message on the right. The Telephone Consumer Protection Act (TCPA) requires that you include the sender's identity. The system will insert opt-out instructions inserted into texts. Please limit text messages to **255 characters**.

IMPORTANT DISCLAIMER: Selerix does not provide legal advice. You are responsible for ensuring your own compliance with any applicable laws, and you should consult with a legal professional if needed.

Text Message: CONTENT ASSIST

TEST TEXT MESSAGE 202 character(s) remaining

Text Message Preview:

CSM 9:45 AM 58%

Engage

Thursday, October 23, 2025

Don't miss out on Open Enrollment! BOLD for OE dates. [Link] Reply STOP to unsubscribe

9:45 AM

Step 7a – Select Delivery Settings – Scheduled Messages

Select the Delivery Date and Time.

LET'S DECIDE ON YOUR DELIVERY SETTINGS

Delivery Date: Delivery Time:

Step 7b – Select Delivery Settings – Event-Driven Messages

If you selected Event-Driven, select the Starts and Ends date, Trigger, and the Delivery Date and delivery Time.

For more information on configuring Event-Driven communications, see the [Creating Event-Driven Engagements](#) section.

Step 8– Build My Audience

You can choose to send to all active employees by toggling the **All Active Employees** button to on.

Click on the **+Audience** button to create a new custom audience or add a global audience. The New Audience dialog box opens.

Specific Employees – Click this button to name your audience, select employees from a Search list, or Import from a template.

Custom Parameters – Click this button to select an audience from the most-used options. .

Step 8a – Building an Audience – Specific Employees

READY TO BUILD YOUR AUDIENCE? HOW WE CAN HELP YOU GET STARTED...

Your audience defines which employees will be included and receive messages for this engagement. Get started by creating a name for this audience and if applicable, use the autocomplete search to add specific employees or import from an Excel file. To include additional audience criteria, use the **Toolbox X** to add or remove different audience types, simply toggle on the audience criteria you want to be included in your target audience.

Audience Title:

SPECIFIC EMPLOYEES

You can find employees using the auto-complete search or by clicking 'Import' to upload an Excel file. Feel free to use both methods together to build your audience for this engagement!

Save as Global Audience

1. Give your audience a name/title.
2. Select the criteria you will use to define the specific employee's audience.
3. You can make the custom audience a global audience (see [Building a global audience](#)) by selecting the Save as Global Audience option.
4. Click the **IMPORT** button.

Note: You can Import an audience if needed. Click the Import button.

IMPORT AUDIENCE ×


To import a list to define a target audience, select the **browse button** and choose an excel file. **This creates audience specific to this engagement only.** Please note that **this audience is for one-time use** and will not be added as a global audience for other engagements. Please conform to our standard import audience template.

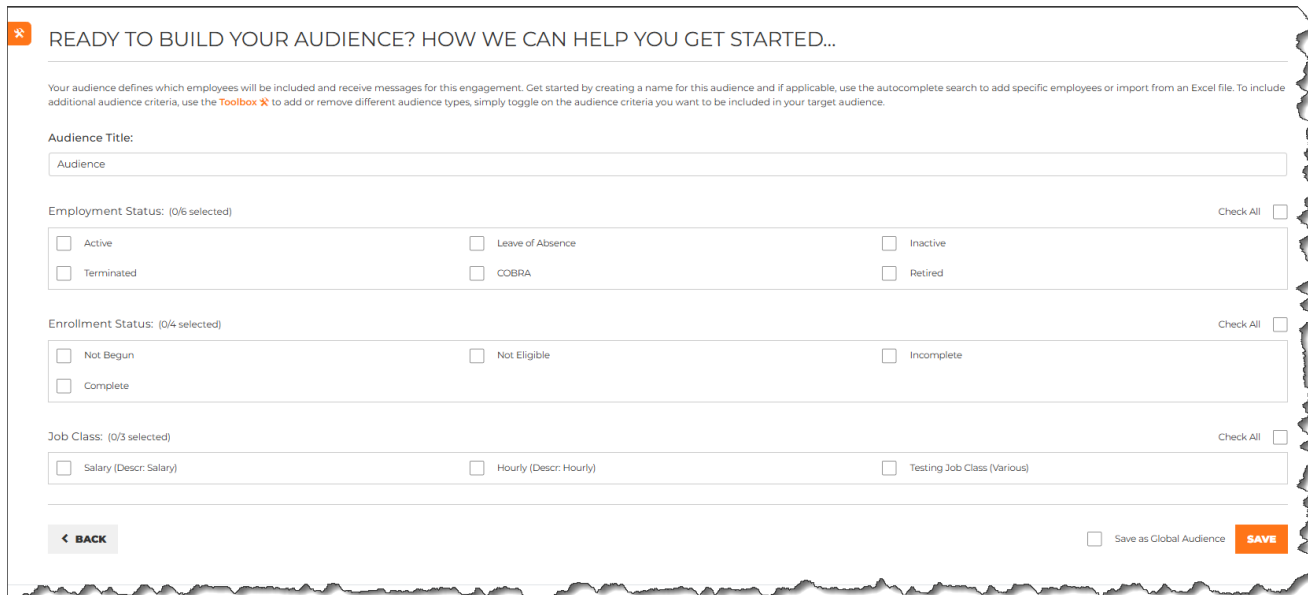
Import Audience:

1. Click the **Browse** button to select an audience file for import. The template is available by clicking **Download Template**.
2. Click **OK**.


Step 8b – Building an Audience – Custom Parameters

When setting up an audience using Custom Parameters, the three most-used audience parameters appear preloaded on your screen.. This includes **Employment Status**, **Enrollment Status**, and **Job Class**.

If you want to add options for the audience, simply click the Toolbox option  at the top left of the page.



READY TO BUILD YOUR AUDIENCE? HOW WE CAN HELP YOU GET STARTED...

Your audience defines which employees will be included and receive messages for this engagement. Get started by creating a name for this audience and if applicable, use the autocomplete search to add specific employees or import from an Excel file. To include additional audience criteria, use the **Toolbox**  to add or remove different audience types, simply toggle on the audience criteria you want to be included in your target audience.

Audience Title:

Employment Status: (0/6 selected) Check All

Active Leave of Absence Inactive
 Terminated COBRA Retired


Enrollment Status: (0/4 selected) Check All

Not Begun Not Eligible Incomplete
 Complete

Job Class: (0/3 selected) Check All

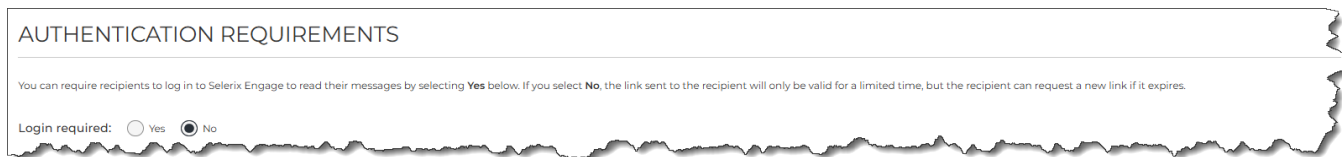
Salary (Descr: Salary) Hourly (Descr: Hourly) Testing Job Class (Various)

Save as Global Audience

Click the  button when you complete your selections.

Step 9 – Authentication Requirements

The authentication requirements will default based on the Settings page. However, you can change the requirement on a per engagement basis.



AUTHENTICATION REQUIREMENTS

You can require recipients to log in to Selerix Engage to read their messages by selecting **Yes** below. If you select **No**, the link sent to the recipient will only be valid for a limited time, but the recipient can request a new link if it expires.

Login required: Yes No

Step 10 – Almost Done

You can enable the message if it is ready to deploy or save the campaign as disabled if it is not ready to deploy. Click **Save** to keep your updates.



ALMOST DONE

Your message will be sent when you enable it. Be sure that you have reviewed and are ready to go before enabling your message. If you will be making additional edits to your message, leave the message disabled until you are ready to send to prevent unfinished messages from being sent.

Enable Message:

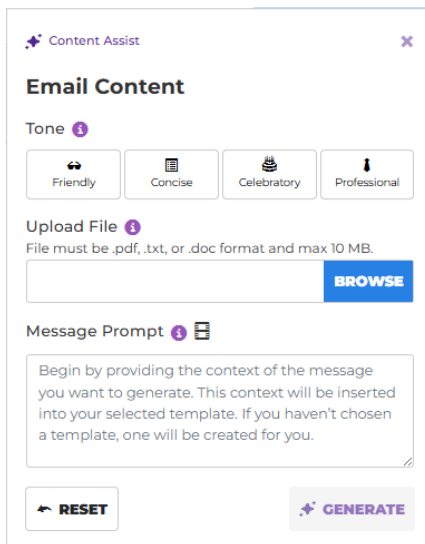
Using Content Assist

When creating a message, you can use Content Assist as an AI partner to help create content for your messages. You should start with a good prompt, which can streamline message creation by offering tone selection, optional document uploads, and prompt-based guidance.

Creating a Good Prompt

From the Message Builder page, click Content Assist (for a message, text or message feed).

The Content Assist window opens.



The screenshot shows a window titled "Content Assist" with a close button (X) in the top right corner. The main heading is "Email Content". Below this, there is a "Tone" section with a help icon (i) and four buttons: "Friendly", "Concise", "Celebratory", and "Professional". Each button has a small icon above it. Below the tone buttons is an "Upload File" section with a help icon (i) and a note: "File must be .pdf, .txt, or .doc format and max 10 MB." There is a text input field and a blue "BROWSE" button. Below that is a "Message Prompt" section with a help icon (i) and a document icon. It contains a text area with the following text: "Begin by providing the context of the message you want to generate. This context will be inserted into your selected template. If you haven't chosen a template, one will be created for you." At the bottom of the window, there are two buttons: "RESET" with a left arrow icon and "GENERATE" with a right arrow icon.

Optionally, select the **tone** you want to use, as well as upload a file for use in reference for the prompt.

Enter a Message Prompt, then click **Generate**.

Scenario-Based Examples

Key elements of effective prompts include some or all of the following:

- Who – is the intended recipient of the message
- What – is the main topic of the message
- Where – will the event/item/main topic take place
- When – are there specific dates/timeframes for the topic
- Why – is the message being sent

Using those “Ws”, here are sample scenarios for creating basic prompts:

Write an open enrollment reminder to employees, using the OE dates of 11/1 – 11/15. Be encouraging; also add that employees may receive additional email reminders until OE starts.

Upload a sample file, such as a Benefits Guide.

Using the uploaded file as a reference, summarize the Medical plan options in a bulleted format, and also include HSA/FSA information.

Help me compare Plan A and Plan B. What are the main differences in cost and coverage?

Create a message that explains in simple terms what an HSA account is, and how best to use it. Encourage employees to sign up!

Upload a sample file for a voluntary benefit, such as a Critical Illness plan.

Create a message that provides highlights of the Critical Illness plan, and outlines why employees should review that plan offering.

The more context you give, the better **Content Assist** can help! Just share what’s relevant, and you’ll get smarter, more accurate responses

Copying a Message

You can copy a message directly from the Manage or Create Messages page.

To copy a message, select the ellipsis and then select either **Copy** or **Copy As**. Selecting Copy will copy the message “as is.” Selecting Copy As will give you the option of changing a scheduled message to an event-driven message or vice versa. The entire message will open on one page, and you can edit or create new message content, change delivery date and time, and setup or reuse a global audience.

Importing a Message

Importing a message is a two-step process. First, you will need to export the message from the case where it was created (case 1). Second, you will need to log into the case in which you want to use the message (case 2) to import it.

Step 1

Log in to the case in which the message was created. From the Manage or Create Message page, select the ellipsis for the message you'd like to export and select Download.

Step 2

Log in to the case in which you want to use the message and click on the Import button. Next, click **Browse** to find the downloaded message. After selecting the downloaded message, select Scheduled or Event-Driven and click **OK**. The entire message will open on one page, and you will need to do the following:

1. Enter new date and time for deployment.
2. Select or create a new audience.
3. Enter new performance goals.



Surveys

Click **Read Only** under the **Engage** section to open the **Read Only** page. Existing Surveys display in the table—you can scroll through pages or use the search bar to find a specific one.

SURVEY TABLE OVERVIEW

Column	Contents	Details
Type	Survey Type	Displays an icon for Scheduled or Event-Driven surveys.
Title	Survey Name	Shows the name/title of the surveys.
Trigger	Activation Method	Indicates whether the campaign is Scheduled or triggered by an event (e.g., New Hire).
Start Date	Launch Timing	The date the campaign begins.
End Date	Completion Timing	The date the campaign ends.
Status	Enabled/Disabled	Shows whether the campaign is currently active or inactive.
Actions	Interaction Options	Includes icons and menu options for managing the campaign.

COLUMN 7: ACTIONS EXPLAINED

-  **Pencil Icon** – Appears when the campaign is **disabled**. Click to edit the campaign.
-  **View Icon** – Appears when the campaign is **enabled**. Click to view the campaign in **read-only** mode.
- **...Ellipsis Menu** – Opens additional options:
 - **Copy** – Duplicates the campaign with its current type (Scheduled or Event-Driven).
 - **Copy As** – Duplicates the campaign and lets you change its type.
 - **Download** – Exports the campaign to your download folder for use in another case.
 - **Engagement Activity** – View detailed engagement metrics (see Engagement Activity section).
 - **Engagement Summary** – View a summary of engagement performance (see Engagement Summary section).

Creating New Surveys

To create a new survey, begin by clicking **+ Add Survey**. You can also copy an existing survey or import a survey from another case or source. See the [Copying a Survey](#) or [Importing a Survey](#) sections. You will be taken on a step-by-step workflow to create your new survey.

Step 1 – Create New

Click the **+ Add Survey** button. The Add Survey dialog box provides options for your survey.

In the From drop-down list, select **Create New** or **Template**.

Give the survey a title and indicate if it is **Scheduled** or **Event Driven**. Click **OK**.

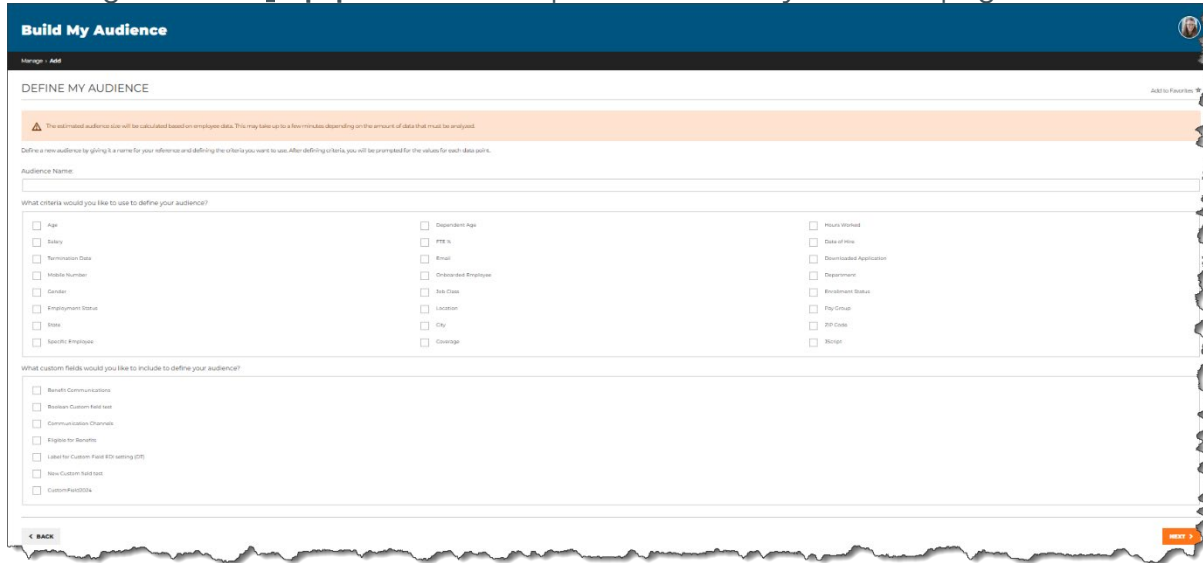
Step 2 – Getting Started

Enter the Valid From and Valid To dates, indicate if it will be anonymous, select a category (optional), and enter a message description (optional).

Click **Next**.

Step 3 – Build My Audience

You can choose to send to all active employees by toggling on the **All Active Employees** button. Click the **At Company** button to add a global audience (accessible to all engagements) or create a new custom audience. The Audience window will open. You will see a list of available global audiences from which to select or click the **More At Company** button to create a custom audience. Clicking the **Acc At Company** button will open the Define My Audience page.



1. Give your custom audience a name.
2. Select the criteria you will use to define the custom audience.
3. If you want to use a custom field to define an audience, select the custom field.
4. Click the **More** button.
5. You can make the custom audience a global audience (see [Building a global audience](#)) by toggling the global button to Yes.
6. Click the **More** button to define the criteria.
7. Click the **Next** button.

Step 4 – Create the Survey Questions

Begin creating survey questions by Click the + Question button. The question box will open where you can enter your questions. You can then select the type of question by selecting

1. Multiple choice – click on the answer bar below to add the answer choices for your question.
2. Yes/No
3. Free text
4. Click **OK**
5. Continue **Click + Question** to add questions.
6. Click **Next** when finished.

Step 5 – Creating the Landing Page

The landing page contains the start button to begin taking the survey. It is very similar to a content page, but it is not optional in a survey. You will see the landing page editor and have three options to create the landing page:

1. Enter content directly into the editor using the available editing tools.
2. Click on the HTML editor button to open the HTML editor. You can then paste your HTML code into the editor. After entering the HTML, click on the T button for a preview of the landing page.
3. Click on the Select a Template link. You can then select a saved template from the Templates section on the left (see the Creating a Template section).

A link to the landing page will automatically be inserted into your survey invitations.

Step 6 – Creating the survey invitation

The invitation is required for the survey to work. It is what let's recipients know they have a survey to answer. Click on the + Invitation to create a new invitation, or click the Import button to import an invitation from another case or source (see importing a message for more information).

1. Enter the invitation title, delivery date and time. Include a description of the invitation if desired.
2. Indicate whether you will inherit the overall survey audience or create a new audience.
3. Create the Message Feed version of your invitation. The message feed invitation will be displayed in the message feed section of the Selerix Engage Employee Portal (see the Selerix Engage Employee Portal section). Enter the title of the message followed by the message. A preview of the message will be shown.
4. Create the Text Message version of your invitation Enter your invitation in the text message window. Text messages are limited to 280 characters. A preview of the text message will be shown and a link to the landing page will be included.
5. Create the email version of your invitation.
 - a. Enter the subject of your email followed by the body of the email.
 - b. Enter content directly into the email editor using the available editing tools; click on the HTML editor button so you can paste your HTML code into the editor; or click the Select a Template link. You can then select a saved template from the Templates section (see the Creating a Template section).

Step 6 – Creating the survey invitation (continued)

6. Create a reminder for your invitation. You can create as many reminders as you like for the invitation. Click the + Reminder button to begin creating the reminder(s). You have two options for your reminder – resending the original message or customizing the reminder.
 - a. To resend the original message:
 - i. Enter the title of the reminder.
 - ii. Enter the date and time it will deploy.
 - iii. Select the condition that will trigger the reminder – invitation not opened, link not clicked or survey not taken.
 - iv. Click OK
 - a. Send a custom reminder
 - i. Enter the title of the reminder.
 - ii. Enter the date and time it will deploy.
 - iii. Select the condition that will trigger the reminder – invitation not opened, link not clicked or survey not taken.
 - iv. Click Custom Reminder, and the Custom Reminder page will open.
 - v. Enter the optional reminder description.
 - vi. Select the version of the reminder that you would like to customize – message feed, text or email.
 - vii. Customize the reminder and click **Save**.
 - viii. Click **Next**

Step 7 – Create a Thank You page

Creating a Thank You page is optional; Selerix Engage will create one for you. However, if you wish to create your own, you will see the thank you page editor and have three options to create the landing page:

1. Enter content directly into the editor using the available editing tools.
2. Click on the HTML editor button to open the HTML editor. You can then paste your HTML code into the editor. After entering the HTML, click on the T button for a preview of the landing page.
3. Click on the **Select a Template** link. You can then select a saved template from the Templates section on the left (see the Creating a Template section).

Step 8 – Set Survey Goals

Setting goals is a great way to measure engagement performance. Use the sliders or the Pencil icon to set goals for open, click and completion rates then click **Next**.

Step 9 – Authentication Requirements

The authentication requirements will default to Yes or No based on the Settings page. However, you can change the requirement on a per engagement basis.

Step 10 – Almost Done

You can enable the survey if it is ready to deploy or save the survey as disabled if it is not ready to deploy.

Copying a Survey

To copy a survey, select the ellipsis and then select either Copy or Copy As. Selecting Copy will copy the survey “as is.” Selecting Copy As will give you the option of changing a scheduled survey to an event-driven survey or vice versa. The entire survey will open on one page, and you will need to do the following:

1. Enter new date and time for deployment.
2. Select or create a new audience.
3. Enter new performance goals.

Importing a Survey

Importing a survey is a two-step process. First, you will need to export the survey from the case where it was created. Second, you will need to log into the case in which you want to use the survey to import it.

Step 1

Log in to the case in which the survey was created. From the Manage or Create Survey page, select the ellipsis for the survey you’d like to export and select Download.

Step 2

Log in to the case in which you want to use the survey and click on the Import button. Next, click Browse to find the downloaded survey. After selecting the downloaded survey, select Scheduled or Event-Driven and click OK. The entire message will open on one page, and you will need to do the following:

1. Enter new date and time for deployment.
2. Select or create a new audience.
3. Enter new performance goals.



Quizzes

Click **Quizzes** under the **Engage** section to open the **Quizzes** page. Existing Quizzes display in the table—you can scroll through pages or use the search bar to find a specific one.

QUIZZES TABLE OVERVIEW

Column	Contents	Details
Type	Quiz	Displays an icon for Scheduled or Event-Driven quizzes.
Title	Quiz Name	Shows the name/title of the quiz.
Trigger	Activation Method	Indicates whether the quiz is Scheduled or triggered by an event (e.g., New Hire).
Valid From	Launch Timing	The date the quiz begins.
Valid To	Completion Timing	The date the quiz ends.
Status	Enabled/Disabled	Shows whether the campaign is currently active or inactive.
Actions	Interaction Options	Includes icons and menu options for managing the campaign.

COLUMN 7: ACTIONS EXPLAINED

-  **Pencil Icon** – Appears when the campaign is **disabled**. Click to edit the campaign.
-  **View Icon** – Appears when the campaign is **enabled**. Click to view the campaign in **read-only** mode.
- **Ellipsis Menu** – Opens additional options:
 - **Copy** – Duplicates the campaign with its current type (Scheduled or Event-Driven).
 - **Copy As** – Duplicates the campaign and lets you change its type.
 - **Download** – Exports the campaign to your download folder for use in another case.
 - **Engagement Activity** – View detailed engagement metrics (see Engagement Activity section).
 - **Engagement Summary** – View a summary of engagement performance (see Engagement Summary section).

Creating New Quizzes

To create a new quiz, begin by clicking **+ Add Quiz**. You can also copy an existing quiz or import a quiz from another case or source. See the Copying a Quiz or Importing a Quiz sections.

You will be taken on a step-by-step workflow to create your new quiz.

Step 1 – Create New

From the Manage or Create Quiz page, click **+ Add Quiz**.

The Add Quiz dialog box provides options for creating the quiz.

ADD QUIZ

To start building a quiz, select between a new quiz or starting from a template. Quiz titles are for reference only and not displayed to employees. When starting from a template, it pre-selects the quiz type, but this can be simply modified by selecting a different type icon.

From: Choose

Title: Quiz title

Choose between a **Scheduled** or **Event-Driven** quiz.

Type:

 Scheduled

 Event-Driven

OK CANCEL

In the From drop-down list, select **Create New** or **Template**.

Give the quiz a title and indicate if it is **Scheduled** or **Event Driven**. Click **OK**.

Step 2 – Getting Started

Enter the Valid From and Valid To dates, indicate if it will be anonymous, select a category (optional), and enter a message description (optional).

Step 3 – Build My Audience

You can choose to send to all active employees by toggling the **All Active Employees** button to on. Click on the +Audience button to add a global audience or create a new custom audience. The Audience window will open. You will see a list of available global audiences from which to select or click on the new audience button to create a custom audience. Clicking the new audience button will open the Define My Audience page.

1. Give your custom audience a name.
2. Select the criteria you will use to define the custom audience.
3. You can make the custom audience a global audience (see building a global audience) by toggling the global button to yes.
4. Click the Next button to define the criteria.
5. Click the save button and click **Next**.

Step 4 – Answer Explanations

You can create explanations after answers are submitted to questions in the quiz. Enable Explanation After Answering button.

Step 5 – Create the Quiz Questions

Begin creating quiz questions by Click the + Question button. The question box will open where you can enter your question. You can then select the type of answer by selecting

1. Multiple choice – click on the answer bar below to add the answer choices for your question.
2. Yes/No
3. True/False
4. Free text
5. Click OK
6. Continue Click + Question to add questions.
7. Click Next when finished.

Step 6 – Creating the Landing Page

The landing page contains the start button to begin taking the quiz. It is very similar to a content page, but it is not optional in a quiz. You will see the landing page editor and have three options to create the landing page:

1. Enter content directly into the editor using the available editing tools.
2. Click on the HTML editor button to open the HTML editor. You can then paste your HTML code into the editor. After entering the HTML, click on the T button for a preview of the landing page.
3. Click on the Select a Template link. You can then select a saved template from the Templates section on the left (see the Creating a Template section).

A link to the landing page will automatically be inserted into your quiz invitations.

Step 7 – Creating the Quiz Invitation

The invitation is required for the quiz to work. It is what let's recipients know they have a quiz to answer. Click on the + Invitation to create a new invitation, or click the Import button to import an invitation from another case or source (see importing a message for more information).

1. Enter the invitation title, delivery date and time. Include a description of the invitation if desired.
2. Indicate whether you will inherit the overall quiz audience or create a new audience.
3. Create the Message Feed version of your invitation. The message feed invitation will be displayed in the message feed section of the Selerix Engage Employee Portal (see the Selerix Engage Employee Portal section). Enter the title of the message followed by the message. A preview of the message will be shown.
4. Create the Text Message version of your invitation Enter your invitation in the text message window. Text messages are limited to 280 characters. A preview of the text message will be shown and a link to the landing page will be included.
5. Create the email version of your invitation.
 - a. Enter the subject of your email followed by the body of the email.
 - b. Enter content directly into the email editor using the available editing tools; click on the HTML editor button so you can paste your HTML code into the editor; or click the Select a Template link. You can then select a saved template from the Templates section (see the Creating a Template section).
6. Create a reminder for your invitation. You can create as many reminders as you like for the invitation. Click the + Reminder button to begin creating the reminder(s). You have two options for your reminder – resending the original message or customizing the reminder.
 - b. To resend the original message:
 - i. Enter the title of the reminder.
 - ii. Enter the date and time it will deploy.
 - iii. Select the condition that will trigger the reminder – invitation not opened, link not clicked or quiz not taken.
 - iv. Click OK
 - b. Send a custom reminder
 - i. Enter the title of the reminder.
 - ii. Enter the date and time it will deploy.
 - iii. Select the condition that will trigger the reminder – invitation not opened, link not clicked or quiz not taken.
 - iv. Click Custom Reminder, and the Custom Reminder page will open.
 - v. Enter the optional reminder description.
 - vi. Select the version of the reminder that you would like to customize – message feed, text or email.
 - vii. Customize the reminder and click Save.
 - viii. Click Next

Step 8 – Create a Thank You page

Creating a Thank You page is optional; Selerix Engage will create one for you. However, if you wish to create your own, you will see the thank you page editor and have three options to create the landing page:

1. Enter content directly into the editor using the available editing tools.
2. Click on the HTML editor button to open the HTML editor. You can then paste your HTML code into the editor. After entering the HTML, click on the T button for a preview of the landing page.
3. Click on the Select a Template link. You can then select a saved template from the Templates section on the left (see the Creating a Template section).

Step 9 – Set Quiz Goals

Setting goals is a great way to measure engagement performance. Use the sliders or the Pencil icon to set goals for open rate, click rate, completion rate, passing score, and pass rate then click next.

Step 10 – Authentication Requirements

The authentication requirements will default to Yes or No based on the Settings page. However, you can change the requirement on a per engagement basis.

Step 11 – Almost Done

You can enable the quiz if it is ready to deploy or save the quiz as disabled if it is not ready to deploy.

Copying a Quiz

To copy a quiz, select the ellipsis and then select either **Copy** or **Copy As**. Selecting Copy will copy the quiz “as is.” Selecting Copy As will give you the option of changing a scheduled quiz to an event-driven quiz or vice versa. The entire quiz will open on one page, and you will need to do the following:

1. Enter new date and time for deployment.
2. Select or create a new audience.
3. Enter new performance goals.

Importing a Quiz

Importing a quiz is a two-step process. First, you will need to export the quiz from the case where it was created. Second, you will need to log into the case in which you want to use the quiz to import it.

Step 1

Log in to the case in which the quiz was created. From the Manage or Create Quiz page, select the ellipsis for the quiz you’d like to export and select **Download**.

Step 2

Log in to the case in which you want to use the quiz and click on the **Import** button. Next, click **Browse** to find the downloaded quiz. After selecting the downloaded quiz, select Scheduled or Event-Driven and click OK. The entire message will open on one page, and you will need to do the following:

1. Enter new date and time for deployment.
2. Select or create a new audience.
3. Enter new performance goals.

Creating Event-Driven Engagements

Event-driven engagements are engagements that deploy based on an event occurring. Event-driven engagements can include:

- Campaigns
- Messages
- Surveys
- Quizzes

Engagements can be based on the following:

1. Added Employee – engagements deploy based on the day an employee is added to the data.
2. Agent Pending – engagements deploy based on an employee moving to agent pending during benefits enrollment.
3. Birthday – engagements deploy based on an employee's birthday.
4. Custom Field Change – engagements deploy based on a change in a custom field. You will also select the specific custom field.
5. Jscript – engagements deploy based on the results of a Jscript.
6. Eligibility Date Change – Select the event date or processing date for the eligibility change.
7. Employment Status – engagements deploy based on a change in employment status. You will also select the specific employment status.
8. Enrollment Complete – engagements deploy based on employee's completing enrollment.
9. EOI Pending – engagements deploy based on an employee moving to EOI pending during benefits enrollment.
10. Grace Period Expiration – Set the number of days before the Grace Period expires.
11. Hire Date Change – engagements deploy based on a change in the employee's hire date.
12. Job Class Change – engagements deploy based on a change in the employee's job class.
13. Life Event – engagements deploy based on a life event. You will also select the specific life event.
14. New Hire – engagements deploy based on a new employee added to the data.
15. Pay Group Change – Select the pay group and then choose Event Date or Processing Date.
16. Pending Documentation – engagements deploy based on an employee needing to submit additional documentation.
17. Rehired Employee – engagements deploy based on past employees being rehired.
18. Salary Change – engagements deploy based on a salary change.
19. Transfer – engagements deploy based on an employee transfer within the organization.
20. Work Anniversary – engagements deploy based on an employee's work anniversary.

The workflow for creating these engagements is very similar to a scheduled engagement, but you use a different method to set the send criteria. Rather than select a specific month, day and year, you need to select the number of days after the event for deployment. In the case of campaigns, EACH component is scheduled based on the occurrence of the event. For example, a three-message, event-driven campaign with the initial message deploying 10 days after the event and each subsequent message being 10 days apart would be scheduled as follows:

1. Event occurs (day 0)
2. First message is scheduled plus 10 days after the event.
3. Second message is scheduled plus 20 days after the event.
4. Third message is scheduled plus 30 days after the event.

Engagement Templates

To make things easier, a library of engagement templates is available for use in your communications. These options include complete engagements such as campaigns, messages, surveys and quizzes, as well as individual engagement components such as content pages and emails. You can easily import templates into engagements and make changes as necessary.

You can find template options within the Templates section. You can preview, copy, edit, or even import your own creations into the appropriate area within the Templates section. To create your own templates, see section 4 – Creating Templates: Content, Campaigns, Messages, Surveys and Quizzes.



Step 1

Determine what kind of engagement you want to deploy (campaign, message, survey or quiz), then head to that section under the Engagements tab.

Step 2

Begin your workflow the same way you would if you were creating an engagement from scratch.

Example: Creating a "Happy Birthday" message that deploys automatically on an employee's birthday

- a. Go to "Messages" under the "Engagements" tab.
- b. Click +Message.
- c. Select "Template" in the "From" drop-down.
- d. A "Template" drop-down menu will appear and you can click or even search for the template you wish to use.
- e. Make your selection, give the message a title, then designate whether it's scheduled or event-driven. Since the birthday message will deploy to employees on their birthday, select Event-Driven.
- f. Click  .

Step 3

At this point your message will auto-populate all the fields from the template you selected with the exception of the day and time of deployment as well as the audience. Add those items and make as many changes to layout and content as you wish.

NOTE: If your selected template has a logo placeholder, be sure to replace it with your own logo or simply select it and delete before deploying. Feel free to reach out to your account manager for further instructions.

Content Page And Email Templates

You also have access to templates for content pages and emails within the Engagement builder. You can view those layouts in the "Content" section under the "Templates" tab and pull them directly into your engagement via the editor.

Step 1

Begin building your new engagement, then when you arrive at the stage to create either the "Content Page" or "Email" portions, you'll see the option to "Select Template" in the top right corner of the editor.

Step 2

Click "Select Template," and a box will open with a preview of the available templates. Select the one that best suits your desired layout, and the content will populate in the editor.

Step 3

At this point, you can edit the content to your liking, replace logos or photos, or even adjust the formatting.




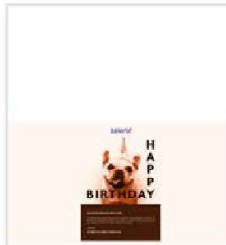

Step 4

Click Next and continue building your engagement. Repeat the previous steps to select an email template.

Select Template
✕

View template thumbnails below. Use the sort and search features to narrow your selections. Click a thumbnail to select.

Template: Q

				
Employee Survey Invitation	Happy Anniversary	Happy Anniversary	Happy Birthday	Happy Birthday

<< < 1 2 3 > >>

Chapter 5: Using Templates

CONTENT, CAMPAIGNS, MESSAGES, SURVEYS & QUIZZES

Templates can make using Engage quicker and easier. This section allows users to save templates for future use. The following templates can be created in the Templates section:

1. Content templates – create templates for content pages and emails.
2. Campaign templates – create complete campaign templates. Campaign templates can include messages, surveys and quizzes.
3. Message templates – create complete message templates.
4. Survey templates – create complete survey templates.
5. Quiz templates – create complete quiz templates.

The screenshot displays the 'Manage or Create Content Templates' interface. On the left is a sidebar with navigation options: Engagement Activity, Engagement Summary, Performance, Manage (Engagements, People, Templates, Content, Campaigns, Messages, Surveys, Quizzes, Settings). The main area is titled 'Manage or Create Content Templates' and includes a description: 'Easily streamline the creation of engagements with an email or content template. Templates allow users to easily modify the content and branding elements. Add Template button at the bottom of this page.' Below this is a table of templates:

Name
Employee Survey Invitation
Employee Survey Landing Page
Happy Anniversary
Happy Anniversary
Happy Anniversary

Below the table is an '+ Add Template' button. Underneath is the 'Add a Template' section with instructions: 'If you'd like to add a new template from scratch, click the + Add Template button below or Import a previously exported template.' At the bottom are '+ Add Template' and 'Import' buttons.

CONTENT TEMPLATES

Click **Content** under the **Settings** section to open the **Manage or Create Content Templates** page. Existing templates display in the table—you can scroll through pages or use the search bar to find a specific one.

The table contains the following columns:

Column one contains icons representing the type of template – email or content page.

Column two contains the name of the template.

Column three indicates whether a template has been enabled and available for use.

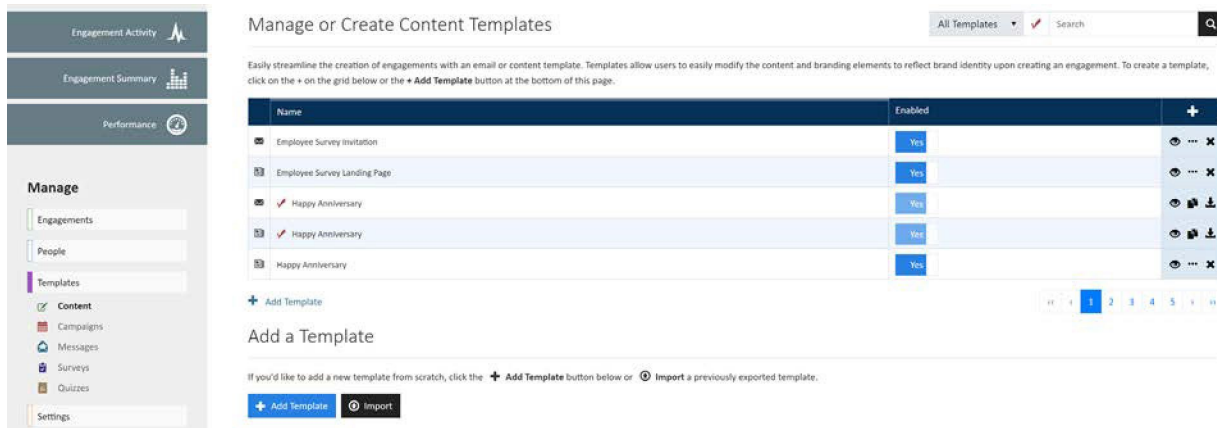
Column four contains several options from which you can select.

Pencil or View icon – if the template is disabled, clicking the pencil icon will allow you to edit the template. If the template is enabled, clicking the View icon will allow you to view the template, but it will be read-only unless you disable it.

Clicking on the ellipsis will open an additional menu.

Copy – copying the template will copy it as it was created.

Download – selecting download exports the template to your download folder. You will then be able to import the template into another case.



Creating New Templates

To create a new template, begin by clicking + Add Template. You can also copy an existing template or import a template from another case or source. See the Copying a Template or Importing a Template section.

Creating a New Template “from Scratch”

You will be taken on a step-by-step workflow to create your new template.

Step 1

Give the template a title and indicate if it is a content page or email template.

Step 2 – Getting Started

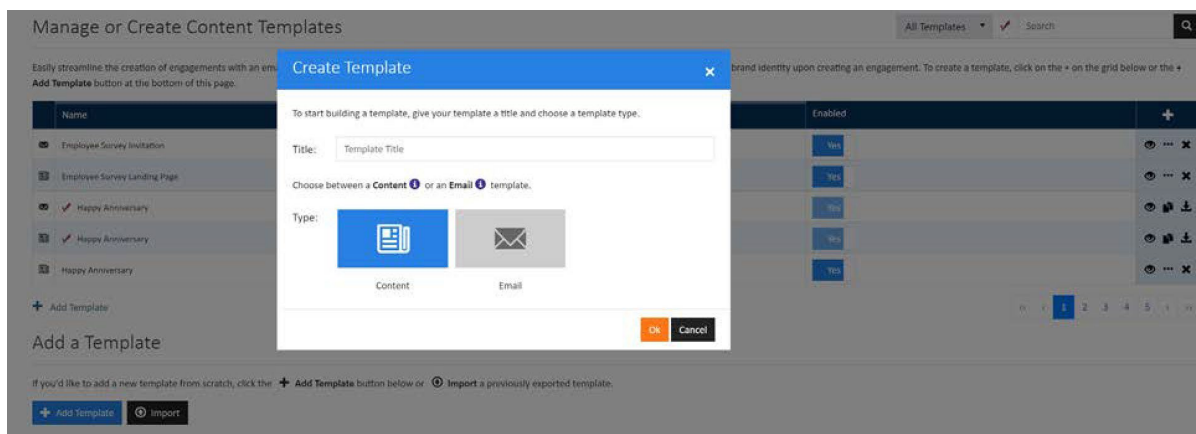
You will see the Title and type of template. Enter a description for your template (optional).

Step 3 – Create Your Template

1. Enter content directly into the editor using the available editing tools.
2. If you choose to use HTML, click on the HTML editor button to open the HTML editor. You can then paste your HTML code into the editor. After entering the HTML, click on the T button for a preview of the content page.

Step 4 – Almost Done

When you are ready, enable the template to make it available for future engagements.



Copying a Template

To copy a template, select the ellipsis and select Copy. Selecting Copy will copy the template “as is.” The template will open on one page, and you will need to do the following:

Enter new title, if necessary.

Edit the current description or give your template a new description (optional).

Make changes to the template as necessary.

Manage or Create Content Templates All Templates Search

Easily streamline the creation of engagements with an email or content template. Templates allow users to easily modify the content and branding elements to reflect brand identity upon creating an engagement. To create a template, click on the + on the grid below or the + Add Template button at the bottom of this page.

Name	Enabled	
<input checked="" type="checkbox"/> Copy of Employee Survey Invitation	No	
<input checked="" type="checkbox"/> Employee Survey Invitation	Yes	
<input checked="" type="checkbox"/> Employee Survey Landing Page	Yes	
<input checked="" type="checkbox"/> Happy Anniversary	Yes	
<input checked="" type="checkbox"/> Happy Anniversary	Yes	

+ Add Template 1 2 3 4 5 11

Add a Template

If you'd like to add a new template from scratch, click the + Add Template button below or Import a previously exported template.

[+ Add Template](#) [Import](#)

Importing a Template

Importing a template is a two-step process. First, you will need to export the template from the case where it was created (case 1). Second, you will need to log into the case in which you want to use the template (case 2) to import it.

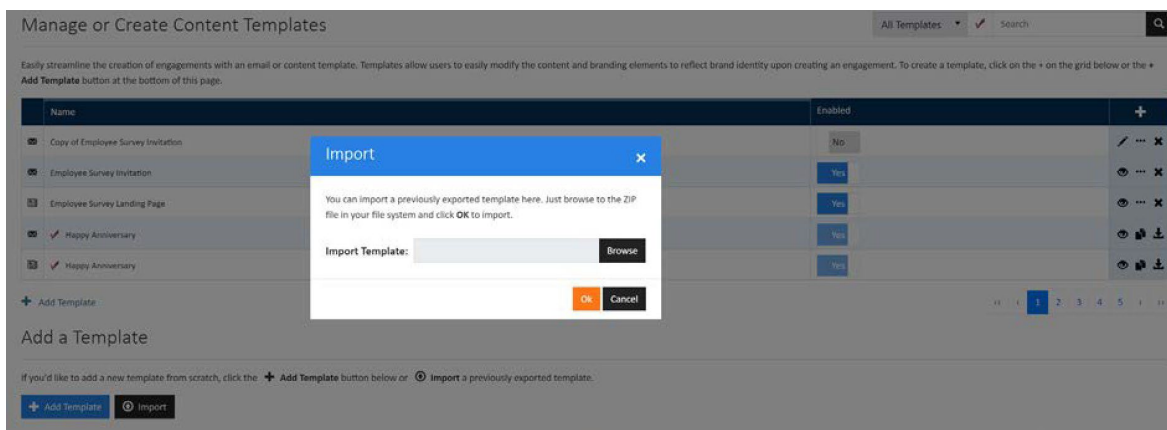
Step 1

Log in to case 1, in which the template was created. From the Manage or Create Templates page, select the ellipsis for the template you'd like to export and select Download.

Step 2

Log in to case 2, in which you want to use the template, then click on the Import button. Next, click Browse to find the downloaded template. After selecting the downloaded template, the template will open on one page, and you will need to do the following:

1. Enter new title, if necessary.
2. Edit the current description or give your template a new description (optional).
3. Make changes to the template as necessary.



CAMPAIGN TEMPLATES

Click **Campaign Templates** under the **Engage** section to open the **Campaign Templates** page. Existing templates display in the table—you can scroll through pages or use the search bar to find a specific one.

The table contains the following columns:

Column one contains icons representing the type of campaign template – scheduled or event-driven.

Column two contains the name of the campaign template.

Column three contains the trigger – scheduled or the name of the trigger. For example, New Hire.

Column four contains the category.

Column five indicates if the campaign template is enabled or disabled.

Column six contains several options from which you can select.

Pencil or View icon – if the campaign template is disabled, clicking the pencil icon will allow you to edit the campaign. If the campaign template is enabled, clicking the View icon will allow you to view the campaign template, but it will be read-only unless you disable it.





b. Clicking on the ellipsis will open an additional menu.

Copy – copying the campaign template will copy it as created – scheduled or event-driven.

Download – selecting download exports the campaign template to your download folder. You will then be able to import the campaign template into another case.

Manage or Create Campaign Templates All Templates

Easily streamline the creation of **Campaign Engagements** with an engagement template. Templates allow users to easily modify the content and branding elements to reflect brand identity upon creating an engagement. To create a template, click on the **+** on the grid below or **+ Add Template** button at the bottom of this page.

Name	Trigger	Category	Enabled	
 Campaign Test	Scheduled		No	  

[+ Add Template](#)

Add a Template

If you'd like to add a new template from scratch, click the **+ Add Template** button below or **Ⓜ Import** a previously exported template.

[+ Add Template](#) [Ⓜ Import](#)

Creating New Campaign Templates

To create a new campaign template, begin by clicking + Add Template. You can also copy an existing campaign template or import a campaign template from another case or source. See the Copying a Campaign Template or Importing a Campaign Template sections.

Creating a New Scheduled Campaign Template “from Scratch”

You will be taken on a step-by-step workflow to create your new campaign.

Step 1

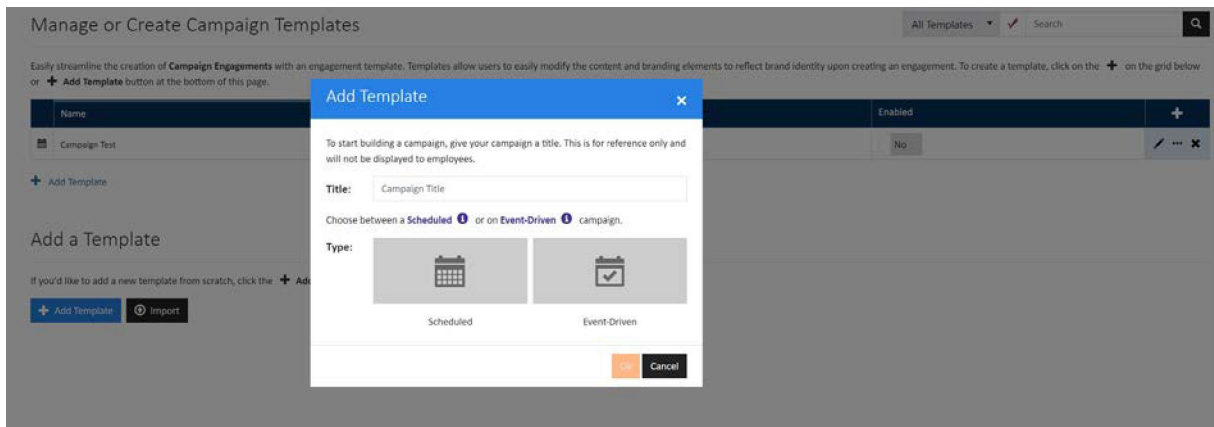
Give the campaign a title and indicate if it is scheduled or event driven.

Step 2 – Getting Started

You will see the title entered in step one. You can also select a category (optional), and enter a campaign template description (optional).

Step 3 – Template Management

You can choose to lock the template which restricts who can modify the template. To restrict the template, select **XOR** and add users who can manage the template. Select **MRJ** to allow any user to make changes.



Step 4 – Adding Survey, Quiz and Message Templates

Decide what type of engagements you will add to your campaign template.

Survey template – Click the + Survey button to create a new survey template or the import button to import an existing survey template. For steps on creating a new survey template, please see the Creating a Survey Template section. If you aren't adding a survey template, click **More**.

Quiz – Click the + Quiz button to create a new quiz template or the import button to import an existing quiz template. For steps on creating a new quiz template, please see the Creating a Quiz Template section. If you won't be adding a quiz template, click **More**.

Message – Click the + Message button to create a new message template or the import button to import an existing message template. For steps on creating a new message template, please see the Creating a Message Template section. If you won't be adding a message template, click **More**.

Step 5 – Almost Done

You can enable the campaign template if it is ready to use for future campaign engagements.

Add a Survey

You can add individual surveys to your campaign on this page. Click on **+ Survey** to create a new survey.

Name +

No Survey Templates found.

+ Survey
Import

Add a Quiz

You can add individual quizzes to your campaign on this page. Click on **+ Quiz** to create a new quiz.

Name +

No Quiz Templates found.

+ Quiz
Import

Add a Message

You can add individual messages to your campaign on this page. Click on **+ Message** to create a new message.

Name +

No Message Templates found.

+ Message
Import

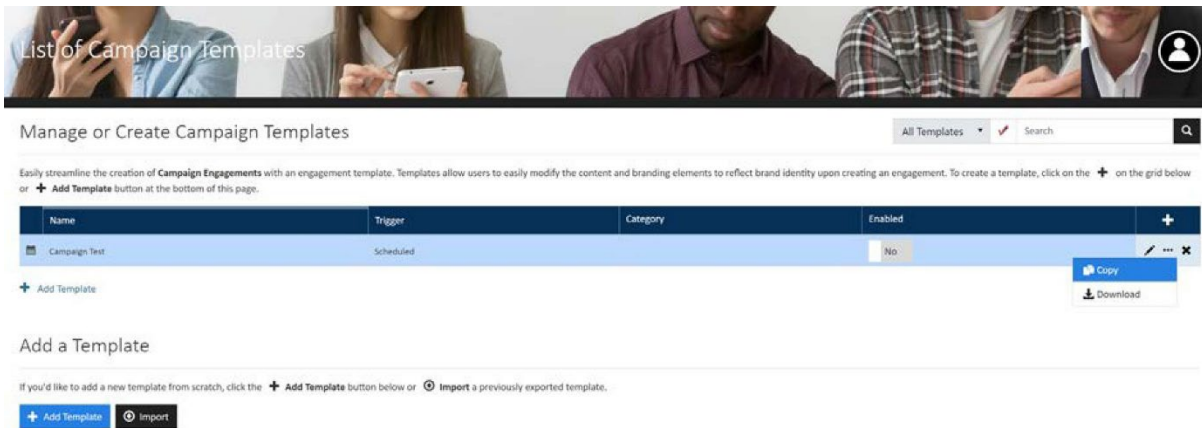
Copying a Campaign Template

To copy a campaign template, select the ellipsis and then select Copy. The campaign template will open on one page, and you will need to do the following:

Enter a name for your new campaign template.

Select a category (optional) and enter a description (optional).

Make any modifications to the components of the campaign.



Importing a Campaign Template

Importing a campaign template is a two-step process. First, you will need to export the campaign template from the case where it was created (case 1). Second, you will need to log into the case in which you want to use the campaign template (case 2) to import it.

Step 1

Log in to case 1, in which the campaign template was created. From the Manage or Create Campaigns Templates page, select the ellipsis for the campaign you'd like to export and select Download.

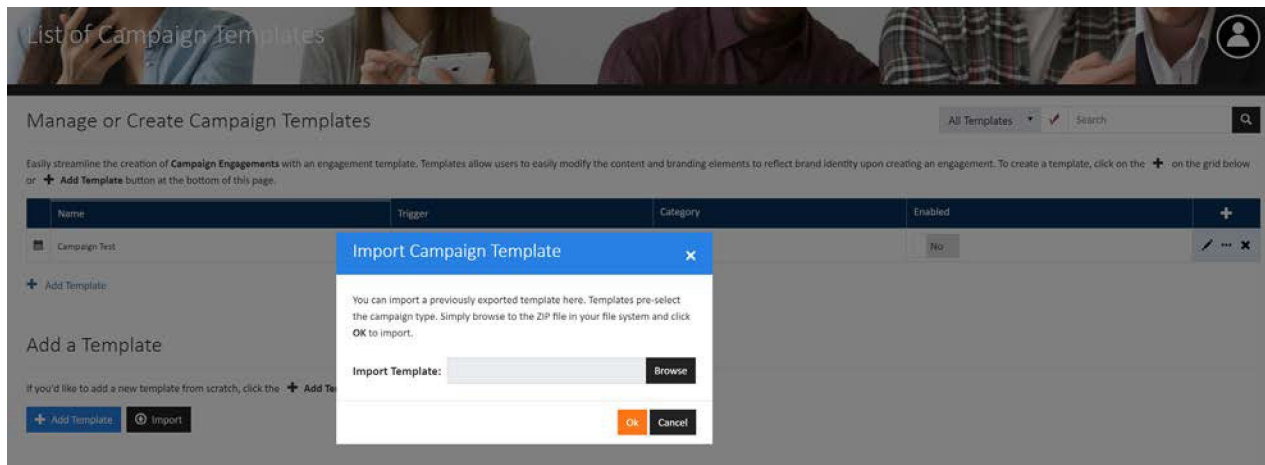
Step 2

Log in to case 2, in which you want to use the campaign template and click the Import button. Next, click Browse to find the downloaded campaign template. Select the downloaded campaign template, and the campaign template will open on one page. You will need to do the following:

Enter a name for your new campaign template.

Select a category (optional) and enter a description (optional).

Make any modifications to the components of the campaign.



MESSAGE TEMPLATES

Begin by clicking Messages in the Templates section. You will be taken to the Manage or Create Message Templates page. All message templates will be listed in the table. You can scroll through each page to find an existing message template or use the search bar above the table. The table contains the following columns:

Column one contains icons representing the type of message template – scheduled or event-driven.

Column two contains the name of the message template.

Column three contains the trigger – scheduled or the name of the trigger.

Columns four contains the category.

Column five indicates if the message template is enabled or disabled.

Column six contains several options from which you can select.

Pencil or View icon – if the message template is disabled, clicking the pencil icon will allow you to edit the campaign. If the message template is enabled, clicking the View icon will allow you to view the message template, but it will be read-only unless you disable it.

Clicking on the ellipsis will open an additional menu.

Copy – copying the message template will copy it as created – scheduled or event-driven.

Download – selecting download exports the message template to your download folder. You will then be able to import the message template into another case.

Manage or Create Message Templates All Templates Search

Easily streamline the creation of **Message Engagements** with an engagement template. Templates allow users to easily modify the content and branding elements to reflect brand identity upon creating an engagement. To create a template, click on the **+** on the grid below or **+ Add Template** button at the bottom of this page.

Name	Trigger	Category	Enabled	+
<input type="checkbox"/> ✓ Life Event: Birthday	Birthday		Yes	
<input type="checkbox"/> ✓ Life Event: Death of Dependent	Death		Yes	
<input type="checkbox"/> ✓ Life Event: Dependent Attained Age	Age Limit		Yes	
<input type="checkbox"/> ✓ Life Event: Dependent Regained Status	Dependent Status		Yes	
<input type="checkbox"/> ✓ Life Event: Divorce	Divorce		Yes	

+ Add Template 1 2 3

Creating a New Message Template “from Scratch”

To create a new message template, begin by clicking + Add Template. You can also copy an existing message template or import a message template from another case or source. See the Copying a Message Template or Importing a Message Template sections. You will be taken on a step-by-step workflow to create your new message template.

Step 1

Give the message template a title and indicate if it is scheduled or event driven.

Step 2 – Getting Started

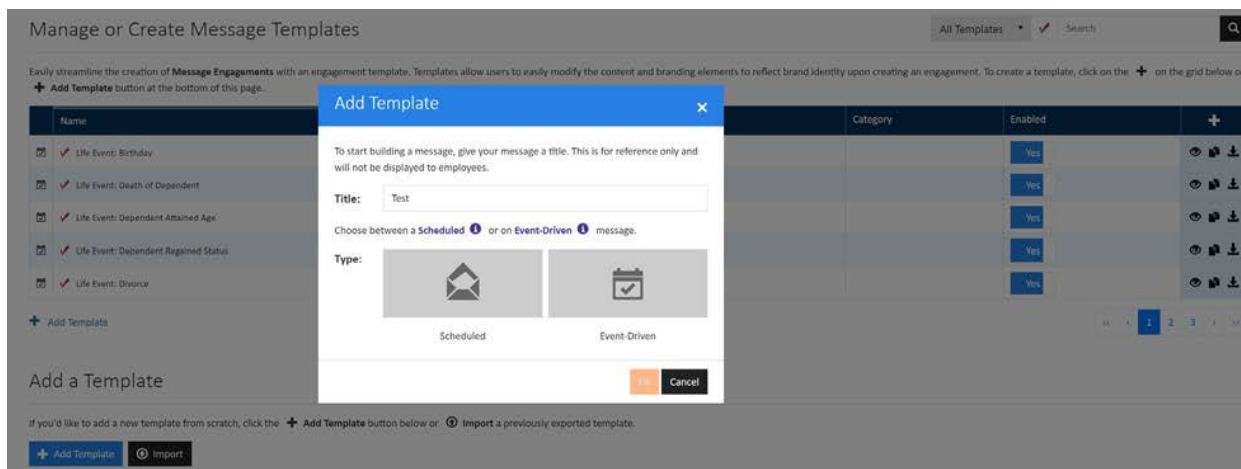
You will see the title entered in step one. You can also select a category (optional) and enter a description (optional).

Step 3 – Display Settings

Display Settings default to Yes which means a time and date stamp will appear on the content page.

Step 4 – Template Management

You can choose to lock the template which restricts who can modify it. To restrict the template, select Yes and add users who can manage it and make changes. Selecting No will allow any user to make changes.



Step 5 – Create Content Page

Creating a content page is optional. A content page is a one-page website giving you an opportunity to house additional information beyond what can be included in the message feed, text message or email. To create a content page, toggle the “Add a content page?” button to Yes. The content page editor will then open. You have three options to create the content page:

1. Enter content directly into the editor using the available editing tools.
2. Click on the HTML editor button to open the HTML editor. You can then paste your HTML code into the editor. After entering the HTML, click on the T button for a preview of the content page.
3. Click on the Select a Template link. You can then select a saved template from the Templates section on the left (see the Creating a Template section).

A link to the content page will automatically be inserted into your messages.

Step 6 – Creating the Message Feed version of your message template

The message feed message will be displayed in the message feed section of the Selerix Engage Employee Portal (see the Selerix Engage Employee Portal section). Enter the title of the message followed by the message. A preview of the message will be shown.

Step 7 – Creating the Text Message version of your message template

Enter your text message in the text message window. Text messages are limited to 255 characters. A preview of the text message will be shown.

Send a Text Message

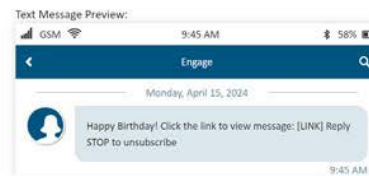
Create a version of your message that will be sent via SMS/Text message. You can preview your text message on the right. Please limit text messages to 280 characters.

IMPORTANT DISCLAIMER: Selerix does not provide legal advice. You are responsible for ensuring your own compliance with any applicable laws, and you should consult with a legal professional if needed.

Text Message:

Happy Birthday! Click the link to view message:

233 character(s) remaining



Copying a Message Template

To copy a message template, select the ellipsis and then select Copy. The message template will open on one page, and you will need to do the following:

1. Enter a name for your new message template.
2. Select a category (optional) and enter a description (optional)
3. Make any modifications to the components of the message template.

Importing a Message Template

Importing a message template is a two-step process. First, you will need to export the message template from the case where it was created (case 1). Second, you will need to log into the case in which you want to use the message template (case 2) to import it.

Step 1

Log in to case 1, in which the message template was created. From the Manage or Create Message Templates page, select the ellipsis for the message template you'd like to export and select Download.

Step 2

Log in to case 2, in which you want to use the message template and click the Import button. Next, click Browse to find the downloaded message template. Select the downloaded message template, and it will open on one page. You will need to do the following:

1. Enter a name for your new message template.
2. Select a category (optional) and enter a description (optional)
3. Make any modifications to the components of the message template.

Manage or Create Message Templates All Templates Search

Easily streamline the creation of **Message Engagements** with an engagement template. Templates allow users to easily modify the content and branding elements to reflect brand identity upon creating an engagement. To create a template, click on the **+** on the grid below or **+ Add Template** button at the bottom of this page.

Name	Trigger	Category	Enabled	
<input type="checkbox"/> ✓ Life Event: Birthday	Birthday		Yes	
<input type="checkbox"/> ✓ Life Event: Death of Dependent	Death		Yes	
<input type="checkbox"/> ✓ Life Event: Dependent Attained Age	Age Limit		Yes	
<input type="checkbox"/> ✓ Life Event: Dependent Regained Status	Dependent Status		Yes	
<input type="checkbox"/> ✓ Life Event: Divorce	Divorce		Yes	

+ Add Template 1 2 3

SURVEY TEMPLATES

Begin by clicking Surveys in the Templates section. You will be taken to the Manage or Create Survey Templates page. All survey templates will be listed in the table. You can scroll through each page to find an existing survey template or use the search bar above the table. The table contains the following columns:

Column one contains icons representing the type of survey template – scheduled or event-driven.

Column two contains the name of the survey template.

Column three contains the trigger – scheduled or the name of the trigger. For example, New Hire.

Columns four contains the category.

Column five indicates if the survey template is enabled or disabled.

Column six contains several options from which you can select.

Pencil or eyeball icon – if the survey template is disabled, clicking the pencil icon will allow you to make changes. If the survey template is enabled, clicking the eyeball icon will allow you to view the template, but it will be read-only unless you disable it.

Clicking on the ellipsis will open an additional menu.

Copy – copying the survey template will copy it as created – scheduled or event-driven.

Download – selecting download exports the survey template to your download folder. You will then be able to import the message template into another case.

Creating a New Survey Template “from Scratch”

To create a new survey template, begin by clicking + Add Template. You can also copy an existing survey template or import a survey template from another case or source. See the Copying a Survey Template or Importing a Survey Template sections.

You will be taken on a step-by-step workflow to create your new survey template.

Step 1

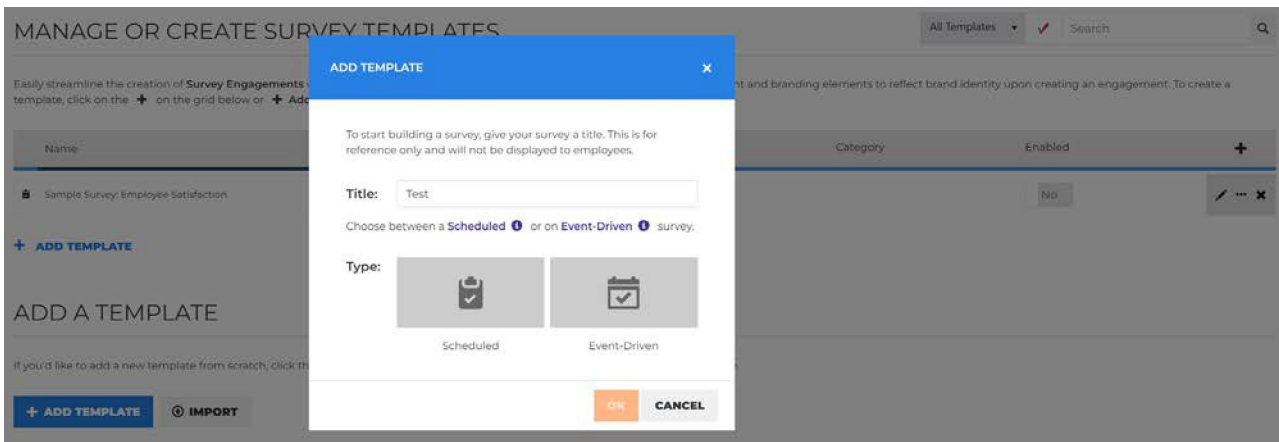
Give the survey template a title and indicate if it is scheduled or event driven.

Step 2 – Getting Started

You will see the title entered in step one. You can also select a category (optional) and enter a description (optional).

Step 3 – Template Management

You can choose to lock the template which restricts who can modify it. To restrict the template, select Yes and add users who can manage it and make changes. Selecting No will allow any user to make changes.



Step 4 – Create the Survey Questions

Begin creating survey questions by clicking on the + Question button. The question box will open where you can enter your questions. You can then select the type of question by selecting

1. Multiple choice – click on the answer bar below to add the answer choices for your question.
2. Yes/No
3. Free text
4. Click OK
5. Continue clicking on + Question to add questions.
6. Click **More** when finished.

SET-UP MY QUESTIONS

Create your survey questions by clicking on **+ Question**. Questions can be either multiple choice, yes/no or free text.

Question	Type	
On a scale of 1 to 10, how satisfied are you with your overall role?	Free Text	✎ 🗑 ✕
How well do you feel your skills and abilities are utilized in your current role?	Free Text	✎ 🗑 ✕
Do you feel that you receive adequate feedback and recognition for your work?	Yes/No	✎ 🗑 ✕
How satisfied are you with the communication within your team and across departments?	Free Text	✎ 🗑 ✕
On a scale of 1 to 10, how would you rate the work-life balance?	Free Text	✎ 🗑 ✕
Are you satisfied with the opportunities for professional development and growth provided by the company?	Yes/No	✎ 🗑 ✕
How supported do you feel by your immediate supervisor and the leadership team?	Free Text	✎ 🗑 ✕
Do you believe that your contributions to the company are valued?	Yes/No	✎ 🗑 ✕
How satisfied are you with the workplace environment and facilities?	Free Text	✎ 🗑 ✕
How do you describe the company to your friends and family?	Free Text	✎ 🗑 ✕

+ QUESTION

Step 5 – Creating the Landing Page

The landing page contains the start button to begin taking the survey. It is very similar to a content page, but it is not optional in a survey. You will see the landing page editor and have three options to create the landing page:

1. Enter content directly into the editor using the available editing tools.
2. Click on the HTML editor button to open the HTML editor. You can then paste your HTML code into the editor. After entering the HTML, click on the T button for a preview of the landing page.
3. Click on the Select Template link. You can then select a saved template from the Templates section on the left (see the Creating a Template section).
4. A link to the landing page will automatically be included in the invitation.

Step 6 – Creating the survey invitation

The invitation is required for the survey to work. It is what let's recipients know they have a survey to answer. Click on the + Invitation to create a new invitation, or click the Import button to import an invitation from another case or source (see importing a message for more information).

1. Enter the invitation title, delivery date and time. Include a description of the invitation if desired.
2. Create the Message Feed version of your invitation. The message feed invitation will be displayed in the message feed section of the Selerix Engage Employee Portal (see the Selerix Engage Employee Portal section). Enter the title of the message followed by the message. A preview of the message will be shown.
3. Create the Text Message version of your invitation. Enter your invitation in the text message window. Text messages are limited to 255 characters. A preview of the text message will be shown and a link to the landing page will be included.
4. Create the email version of your invitation.
 - a. Enter the subject of your email followed by the body of the email.
 - b. Enter content directly into the email editor using the available editing tools; click on the HTML editor button so you can paste your HTML code into the editor; or click the Select a Template link. You can then select a saved template from the Templates section (see the Creating a Template section).

Step 7 – Create a Thank You page

Creating a Thank You page is optional; Selerix Engage will create one for you. However, if you wish to create your own, you will see the thank you page editor and have three options to create the landing page:

Enter content directly into the editor using the available editing tools.

Click on the HTML editor button to open the HTML editor. You can then paste your HTML code into the editor. After entering the HTML, click on the T button for a preview of the landing page.

Click on the Select a Template link. You can then select a saved template from the Templates section on the left (see the Creating a Template section).

Step 8 – Authentication Requirements

The authentication requirements will default based on the Settings page. However, you can change the requirement for your template.

Step 9 – Almost Done

You can enable the survey template if it is ready for use or save it as disabled if it is not ready for use.

AUTHENTICATION REQUIREMENTS

You can require recipients to log in to Selerix Engage to read their messages by selecting **Yes** below. If you select **No**, the link sent to the recipient will only be valid for a limited time, but the recipient can request a new link if it expires.

Login required: Yes No

ALMOST DONE

This template is not going to be available until it has been enabled for use. Be sure that you have reviewed and are ready to go before enabling your template. If you will be making additional edits to your template, leave it disabled until you are ready to deploy to prevent unfinished messages from being sent.

Enable Template:

Copying a Survey Template

To copy a survey template, select the ellipsis and then select Copy. The message template will open on one page, and you will need to do the following:

1. Enter a name for your new survey template.
2. Select a category (optional) and enter a description (optional)
3. Make any modifications to the components of the message template.

Importing a Survey Template

Importing a Survey template is a two-step process. First, you will need to export the survey template from the case where it was created (case 1). Second, you will need to log into the case in which you want to use the survey template (case 2) to import it.

Step 1

Log in to case 1, in which the survey template was created. From the Manage or Create Survey Templates page, select the ellipsis for the survey template you'd like to export and select Download.

Step 2

Log in to case 2, in which you want to use the survey template and click the Import button. Next, click Browse to find the downloaded survey template. Select the downloaded survey template, and it will open on one page. You will need to do the following:

1. Enter a name for your new survey template.
2. Select a category (optional) and enter a description (optional)
3. Make any modifications to the components of the survey template.

QUIZ TEMPLATES

To create a new quiz template, begin by clicking + Add Template. You can also copy an existing quiz template or import a quiz template from another case or source. See the Copying a Quiz Template or Importing a Quiz Template sections.

Creating a New Quiz Template “from Scratch”

You will be taken on a step-by-step workflow to create your new quiz template.

Step 1

Give the quiz template a title and indicate if it is scheduled or event driven.

Step 2 – Getting Started

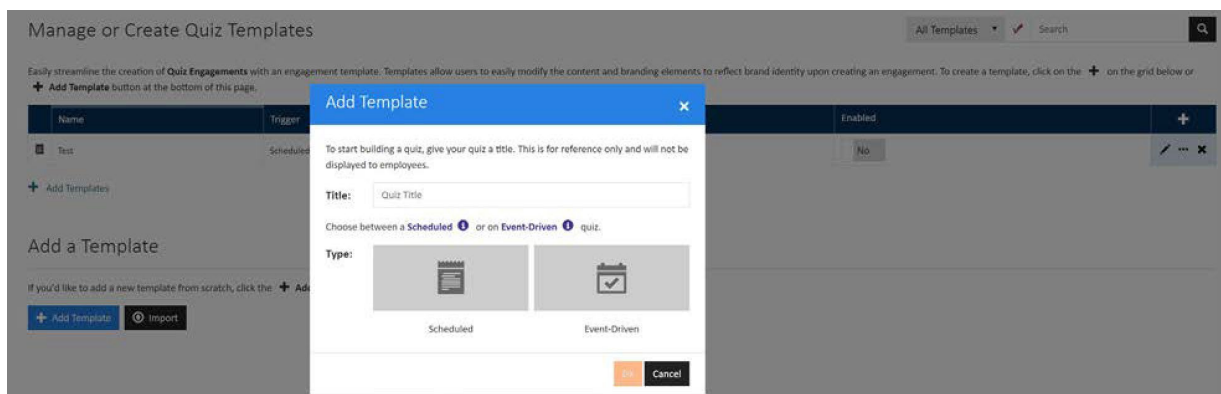
You will see the title entered in step one. You can also select a category (optional) and enter a description (optional).

Step 3 – Template Management

You can choose to lock the template which restricts who can modify it. To restrict the template, select Yes and add users who can manage it and make changes. Selecting No will allow any user to make changes.

Step 4 – Question Feedback

You can create explanations after answers are submitted to questions in the quiz.



Step 5 – Create the Quiz Questions

1. Begin creating quiz questions by clicking on the + Question button. The question box will open where you can enter your questions. You can then select the type of question by selecting
2. Multiple choice – click on the answer bar below to add the answer choices for your question.
3. Yes/No
4. True/False
5. Free text
6. Indicate the correct answer and click OK
7. Continue clicking on + Question to add questions.
8. Click **Move** when finished.

SET-UP MY QUESTIONS

Create your quiz questions by clicking on **+ Question**. Questions can be either multiple choice, yes/no, true/false or free text.

Question	Type	+
What is Lorem Ipsum?	Multiple Choice	✍️ 🗑️ ✕
In quam metus, pretium est amet?	Multiple Choice	✍️ 🗑️ ✕
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer nec odio.	Multiple Choice	✍️ 🗑️ ✕
Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas.	Multiple Choice	✍️ 🗑️ ✕
Quisque ullamcorper placerat ipsum.	Multiple Choice	✍️ 🗑️ ✕
Curabitur nec arcu vel dui cursus varius.	Multiple Choice	✍️ 🗑️ ✕
Maecenas faucibus mollis interdum.	Multiple Choice	✍️ 🗑️ ✕
Aliquam erat volutpat. Aenean posuere libero eu augue condimentum rhoncus.	Multiple Choice	✍️ 🗑️ ✕
Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.	Multiple Choice	✍️ 🗑️ ✕
Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium.	Multiple Choice	✍️ 🗑️ ✕

+ QUESTION

Step 6 – Creating the Landing Page

The landing page contains the start button to begin taking the quiz. It is very similar to a content page, but it is not optional in a quiz. You will see the landing page editor and have three options to create the landing page:

1. Enter content directly into the editor using the available editing tools.
2. Click on the HTML editor button to open the HTML editor. You can then paste your HTML code into the editor. After entering the HTML, click on the T button for a preview of the landing page.
3. Click on the Select Template link. You can then select a saved template from the Templates section on the left (see the Creating a Template section).

A link to the landing page will automatically be inserted into your quiz invitations.

Step 7 – Creating the quiz invitation

The invitation is required for the quiz to work; it allows recipients to know they have a quiz to answer. Click on the + Invitation to create a new invitation or click the Import button to import an invitation from another case or source (see importing a message for more information).

1. Enter the invitation title, delivery date and time. Include a description of the invitation if desired.
2. Create the Message Feed version of your invitation. The message feed invitation will be displayed in the message feed section of the Selerix Engage Employee Portal (see the Selerix Engage Employee Portal section). Enter the title of the message followed by the message. A preview of the message will be shown.
3. Create the Text Message version of your invitation. Enter your invitation in the text message window. Text messages are limited to 255 characters. A preview of the text message will be shown and a link to the landing page will be included.
4. Create the email version of your invitation.
 - a. Enter the subject of your email followed by the body of the email.
 - b. Enter content directly into the email editor using the available editing tools; click on the HTML editor button so you can paste your HTML code into the editor; or click the Select a Template link. You can then select a saved template from the Templates section (see the Creating a Template section).

CREATE A LANDING PAGE

Your quiz will be sent with an initial greeting message. This message should convey to the recipients the purpose of the quiz with an invitation to participate. You can add a header image to the invitation as well.

Header Image: IMAGE GUIDELINES

Upload a Jumbotron image 🗑

Message: SELECT TEMPLATE

B I U *ABC* **X** **X'** **☰** **☷** **☹** **☺** **☻** **☼** **☽** **☾** **☿** **♈** **♉** **♊** **♋** **♌** **♍** **♎** **♏** **♐** **♑** **♒** **♓** **☰** **☷** **☹** **☺** **☻** **☼** **☽** **☾** **☿** **♈** **♉** **♊** **♋** **♌** **♍** **♎** **♏** **♐** **♑** **♒** **♓** **A** **0** **Format** **🗑** **🗑** **🗑** (inherited font) (inherited size)

☰ **☷** **☹** **☺** **☻** **☼** **☽** **☾** **☿** **♈** **♉** **♊** **♋** **♌** **♍** **♎** **♏** **♐** **♑** **♒** **♓** **</>**

LOGO

ADD AN INVITATION

You can add individual invitations to your quiz on this page. Click on **+ Invitation** to create a new invitation.

Name: +

Time to test your knowledge! ✎ 🗑 ⬇ ✕

+ INVITATION **🗑 IMPORT**

Step 8 – Create a Thank You page

Creating a Thank You page is optional; Selerix Engage will create one for you. However, if you wish to create your own, you will see the thank you page editor and have three options to create the landing page:

1. Enter content directly into the editor using the available editing tools.
2. Click on the HTML editor button to open the HTML editor. You can then paste your HTML code into the editor. After entering the HTML, click on the T button for a preview of the landing page.
3. Click on the Select a Template link. You can then select a saved template from the Templates section on the left (see the Creating a Template section).

Step 9 – Authentication Requirements

The authentication requirements will default based on the Settings page. However, you can change the requirement for your template.

Step 10 – Almost Done

You can enable the quiz template if it is ready for use or save it as disabled if it is not ready for use.

Copying a Quiz Template

To copy a quiz template, select the ellipsis and then select Copy. The quiz template will open on one page, and you will need to do the following:

1. Enter a name for your new quiz template.
2. Select a category (optional) and enter a description (optional)
3. Make any modifications to the components of the quiz template.

MANAGE OR CREATE QUIZ TEMPLATES All Templates Search

Easily streamline the creation of **Quiz Engagements** with an engagement template. Templates allow users to easily modify the content and branding elements to reflect brand identity upon creating an engagement. To create a template, click on the **+** on the grid below or **+ Add Template** button at the bottom of this page.

Name	Trigger	Category	Enabled	
Quiz Sample: Lorem ipsum	Scheduled		No	<div style="display: flex; align-items: center;"> ⋮ <div style="margin-left: 5px;"> Copy Download </div> </div>

+ ADD TEMPLATES

ADD A TEMPLATE

If you'd like to add a new template from scratch, click the **+ Add Template** button below or **Ⓜ Import** a previously exported template.

+ ADD TEMPLATE
Ⓜ IMPORT

Importing a Quiz Template

Importing a quiz template is a two-step process. First, you will need to export the quiz template from the case where it was created (case 1). Second, you will need to log into the case in which you want to use the quiz template (case 2) to import it.

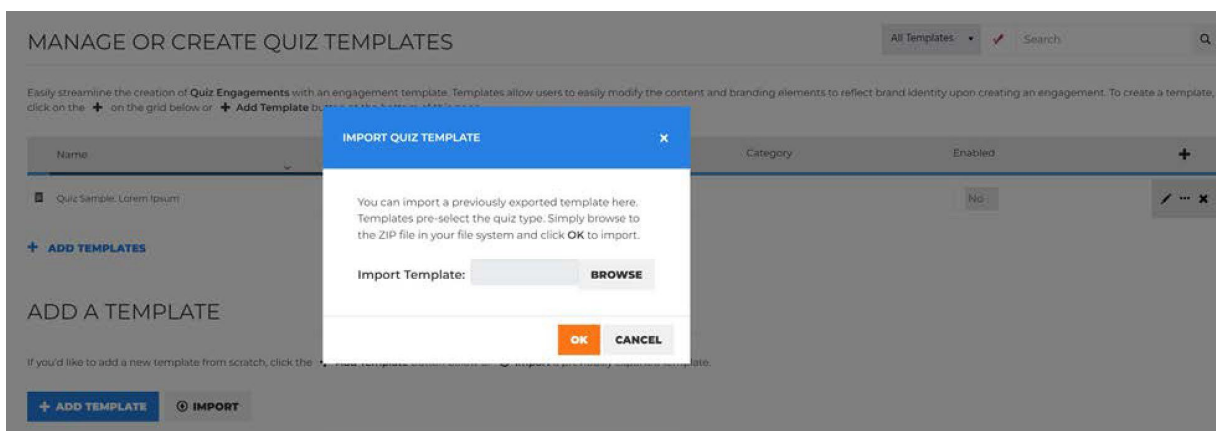
Step 1

Log in to case 1, in which the quiz template was created. From the Manage or Create Quiz Templates page, select the ellipsis for the quiz template you'd like to export and select Download.

Step 2

Log in to case 2, in which you want to use the quiz template and click the Import button. Next, click Browse to find the downloaded quiz template. Select the downloaded quiz template, and it will open on one page. You will need to do the following:

1. Enter a name for your new quiz template.
2. Select a category (optional) and enter a description (optional)
3. Make any modifications to the components of the quiz template.



Chapter 6: Managing Content Settings

Creating Global Audiences

Global audiences can be created outside of an engagement. A global audience is simply an audience that is available for use in all engagements. Creating global audiences saves time; you won't have to recreate the same audience each time you create an engagement.

Steps to Create a Global Audience

1. Click on Audiences in the People section.
2. The Manage or Create Audiences page will open. If you've created audiences, they will be listed in a table. The table has the following columns:
 - a. Column one contains the audience icon.
 - b. Column two contains the name of the audiences.
 - c. Column three contains the estimated audience size.
 - d. Column four contains the date and time when the audience size was estimated.
 - e. Column five contains several items:
 - i. Click the Pencil icon allows you to edit the audience. Note: this will affect engagements in which the audience has been previously used.
 - ii. Click the star icon will make the audience a favorite.
 - iii. Clicking the download icon will download a Microsoft Excel spreadsheet of the audience.
 - iv. Clicking the X will delete the audience. Note: this will affect engagements in which the audience has been previously used.
3. Click the + Audience button to create a new audience.
4. Give the audience a name on the Define My Audience page.
5. Select the criteria you will use to define your audience then click Next.
6. Define the values for the selected criteria on My Audience Specifications page then Click Save.
7. The audience will now be listed on the Manage or Create Audiences page and is ready to be used in your engagements.

Managing Employee Data

The Employees section gives you access to all employees in the case along with their contact information. This gives you the ability to manage individual employee data without the need to leave Selerix Engage and log in to the benefits administration platform.

How to Manage Employee Data

1. Click on Employees in the People section.
2. The Employees page will open with a table list of all employees in the case. Search for specific employees using the search bar at the upper left of the page.
3. The table contains the following items.
 - a. Column one contains an employee icon.
 - b. Column two contains the employee names.
 - c. Column three contains the employee's work email. If missing, it has not been collected.
 - d. Column four contains the employee's personal email. If missing, it has not been collected.
 - e. Column five contains the employee's mobile number. If missing, it has not been collected.

Placeholders

Personalize your engagements with the use of placeholders. To personalize your communications, enter a placeholder anywhere in your communications – Message Feed, Text Messages and Emails.

1. Employee ID - [EMPLOYEE_ID]	28. Employee Job Class - [EMPLOYEE_JOB_CLASS]
2. Employee User ID - [EMPLOYEE_USER_ID]	29. Employee Pay Group - [EMPLOYEE_PAY_GROUP]
3. Employee Prefix - [EMPLOYEE_PREFIX]	30. Employee Date of Hire - [EMPLOYEE_DATE_OF_HIRE]
4. Employee Nickname [EMPLOYEE_PREFERRED_NAME]	31. Employee Termination Date - [EMPLOYEE_TERMINATION_DATE]
5. Employee First Name – [EMPLOYEE_FIRST_NAME]	32. Employee Hour per Week - [EMPLOYEE_HOURS_PER_WEEK]
6. Employee Middle Name - [EMPLOYEE_MIDDLE_INITIAL]	33. Employee Title - [EMPLOYEE_TITLE]
7. Employee Last Name - [EMPLOYEE_LAST_NAME]	34. Employee Employment Status - [EMPLOYEE_EMPLOYMENT_STATUS]
8. Employee Suffix - [EMPLOYEE_SUFFIX]	35. Employee Eligibility Date - [EMPLOYEE_ELIGIBILITY_DATE]
9. Employee Full Name - [EMPLOYEE_FULL_NAME]	36. Employee PTO Balance - [EMPLOYEE_PTO_BALANCE]
10. Employee Date of Birth - [EMPLOYEE_DATE_OF_BIRTH]	37. Employee Enrollment Status - [EMPLOYEE_ENROLLMENT_STATUS]
11. Employee Marital Status - [EMPLOYEE_MARITAL_STATUS]	38. Employee Location - [EMPLOYEE_LOCATION]
12. Employee Home Address Line 1 - [EMPLOYEE_HOME_ADDRESS_LINE_1]	39. Employee Location EIN - [EMPLOYEE_LOCATION_EIN]
13. Employee Home Address Line 2 - [EMPLOYEE_HOME_ADDRESS_LINE_2]	40. Employee Location Contact Company - [EMPLOYEE_LOCATION_CONTACT_COMPANY]
14. Employee Home Address City - [EMPLOYEE_HOME_ADDRESS_CITY]	41. Employee Location Phone - [EMPLOYEE_LOCATION_PHONE]
15. Employee Home Address State - [EMPLOYEE_HOME_ADDRESS_STATE]	42. Employee Location Address Line 1 - [EMPLOYEE_LOCATION_ADDRESS_LINE_1]
16. Employee Home Address Zip - [EMPLOYEE_HOME_ADDRESS_ZIP]	43. Employee Location Address Line 2 - [EMPLOYEE_LOCATION_ADDRESS_LINE_2]
17. Employee Mailing Address Line 1 - [EMPLOYEE_MAILING_ADDRESS_LINE_1]	44. Employee Location Address City - [EMPLOYEE_LOCATION_ADDRESS_CITY]
18. Employee Mailing Address Line 2 - [EMPLOYEE_MAILING_ADDRESS_LINE_2]	45. Employee Location Address State - [EMPLOYEE_LOCATION_ADDRESS_STATE]
19. Employee Mailing Address City - [EMPLOYEE_MAILING_ADDRESS_CITY]	46. Employee Location Address Zip - [EMPLOYEE_LOCATION_ADDRESS_ZIP]
20. Employee Mailing Address State - [EMPLOYEE_MAILING_ADDRESS_STATE]	47. Current Date – [DATE_NOW]
21. Employee Mailing Address Zip - [EMPLOYEE_MAILING_ADDRESS_ZIP]	48. "Employee" and "Person" scope custom fields - [EMPLOYEE_CUSTOM_FIELD_{custom_field_label}]
22. Employee Work Phone - [EMPLOYEE_WORK_PHONE]	49. Employer Name - [EMPLOYER_NAME]
	50. Case Name - [CASE_NAME]
	51. Enrollment Site Link - [ENROLLMENT_SITE]
	52. Open Enrollment Period - [OPEN_ENROLLMENT_PERIOD]
	53. Employee Unsubscribe Link - [EMPLOYEE_UNSUBSCRIBE_URL]
	54. Employee Portal link - [EMPLOYEE_LOGIN_LINK_URL] Open Enrollment Start and End Dates -

<p>23. Employee Home Phone - [EMPLOYEE_HOME_PHONE]</p> <p>24. Employee Mobile Phone - [EMPLOYEE_MOBILE_PHONE]</p> <p>25. 24.Employee Work Email - [EMPLOYEE_WORK_EMAIL]</p> <p>26. Employee Personal Email - [EMPLOYEE_PERSONAL_EMAIL]</p> <p>27. Employee Department - [EMPLOYEE_DEPARTMENT]</p>	<p>[OPEN_ENROLLMENT_START] and [OPEN_ENROLLMENT_END]</p> <p>55. Plan Year Start - [PLAN_YEAR_START]</p>
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Chapter 7: Get Set For Success

Selerix Engage Checklist

- Make your selections on the Settings page prior to deploying your engagements.
- Test all engagements (including links) prior to deploying to intended audience.
- Preview HTML content pages, landing pages, thank you pages and emails prior to deployment.
- Preview estimated audience to review mobile numbers and email addresses.
- Download and review recipient spreadsheet.
- Continue to review engagements until completed.
- Set proper roles and permissions for all administrative users.

Whitelisting

Some organizations must whitelist our websites and servers so that they are accessible behind VPNs or company firewalls. To ensure access to Selerix websites and software products, such as Engage and BenSelect, we recommend you whitelist by IP address, if possible, as IPs are the most likely to stay consistent. If whitelisting IP addresses is not possible, you may use the Domain names listed below instead.

IP Whitelist

- 168.245.75.131
- 149.72.210.238

Email Address

do-not-reply@benselect.com

Domain Whitelist

If possible, use a wildcard to whitelist all of these domains at once. For example, ***benselect.com**.

Email Security Certificates

The certificates below are used by Selerix to authenticate emails when they are deployed from Selerix Engage.

DL AQC – Domain-based Message Authentication, Reporting & Conformance, is an email authentication, policy, and reporting protocol. It builds on the widely deployed SPF and DKIM protocols, adding linkage to the author (“From:”) domain name, published policies for recipient handling of authentication failures, and reporting from receivers to senders, to improve and monitor protection of the domain from fraudulent email.

DJ H – Domain Keys Identified Mail, is an email authentication technique that allows the receiver to check that an email was indeed sent and authorized by the owner of that domain. This is done by giving the email a digital signature. This DKIM signature is a header that is added to the message and is secured with encryption.

SPF– Sender Policy Framework, is an email authentication protocol and part of email cybersecurity used to stop phishing attacks. It allows a company to specify who is allowed to send email on behalf of a domain.

Unsubscribe Links

The CAN-SPAM Act of 2003 sets the rules for all commercial email, establishes email requirements, gives recipients the right to stop emails, and dictates penalties for violations.

If the primary purpose of your email is to advertise or promote a commercial product or service it is considered a commercial email and must comply with the requirements of the CAN-SPAM Act.

IMPORTANT DISCLAIMER: Selerix does not provide legal advice. This content is intended merely to raise awareness of some laws that may apply to your use of Selerix's offerings. You are responsible for ensuring your own compliance with any such applicable laws, and you should consult with a legal professional if needed.

How to insert an unsubscribe link

1. Select the content that you will use for the hyperlink.
2. Click on the hyperlink button on the toolbar.
3. Enter the placeholder, [EMPLOYEE_UNSUBSCRIBE_URL], in the web address window.
4. Click the Insert button.