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

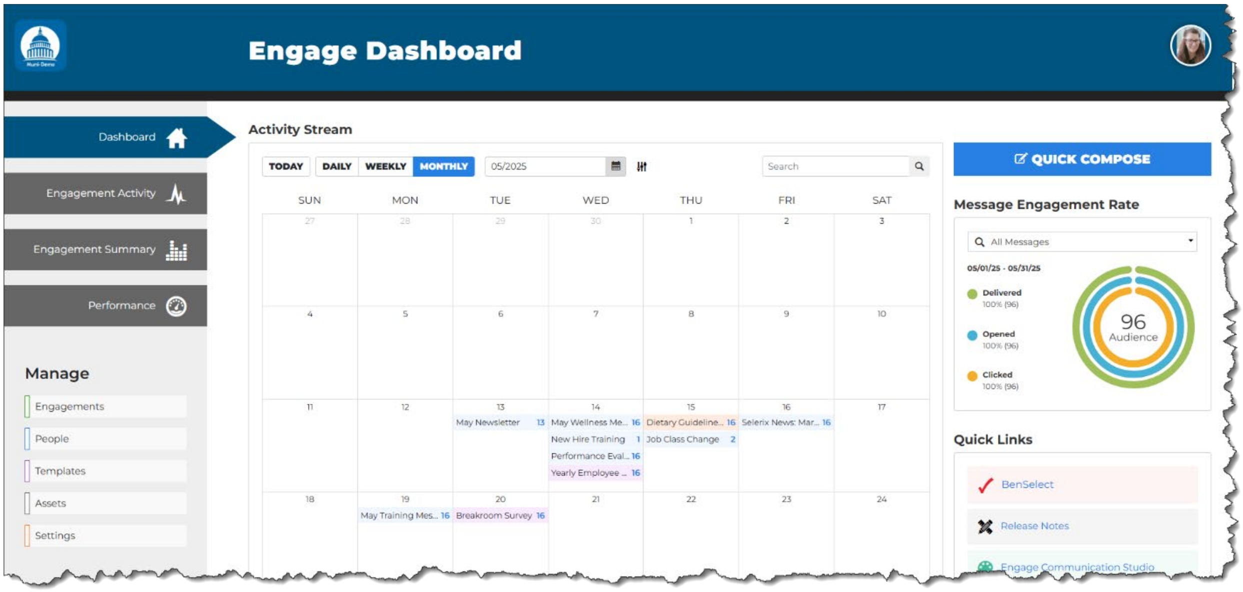
Selerix Engage provides user roles to give you control over the level of access administrative you will have within the Selerix Engage platform.

- **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

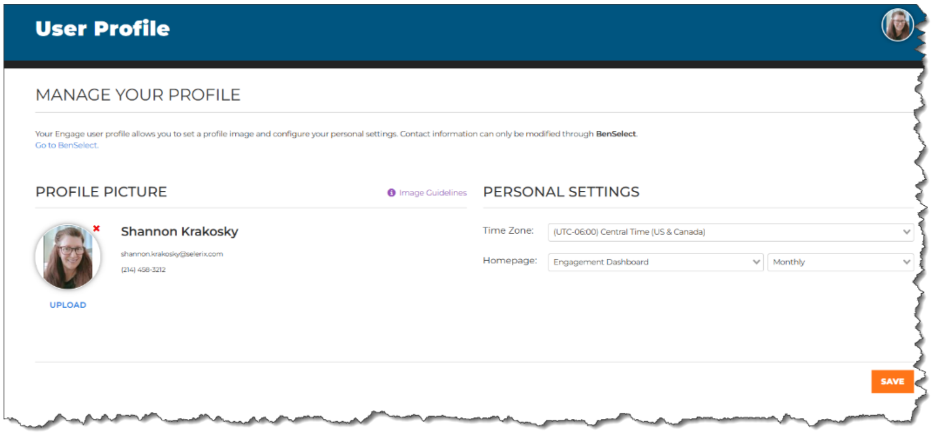
1. Open Selerix Engage by logging in to the BenSelect Admin site dashboard. Current BenSelect users utilize their current credentials. New users can request credentials via case administrators who are authorized to grant access.
2. Click the **Selerix Engage** icon  at the upper right corner of the screen.



Your Profile

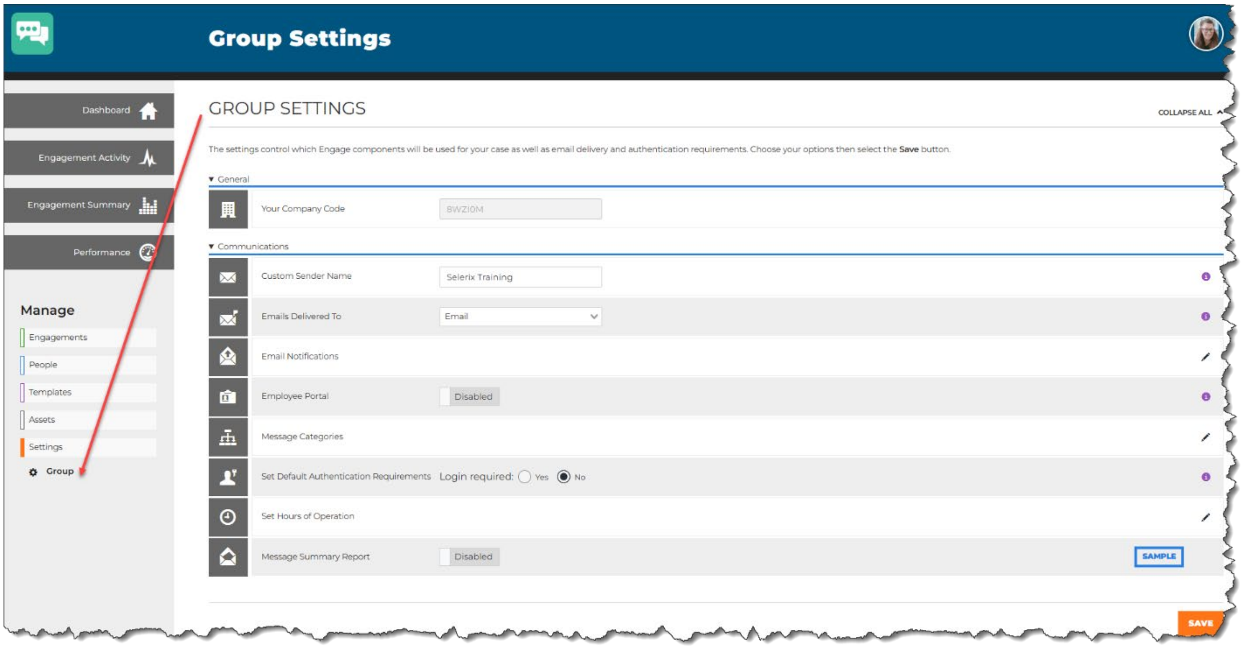
Access your profile in the upper right corner of your Selerix Engage screen. Your profile allows you to

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.



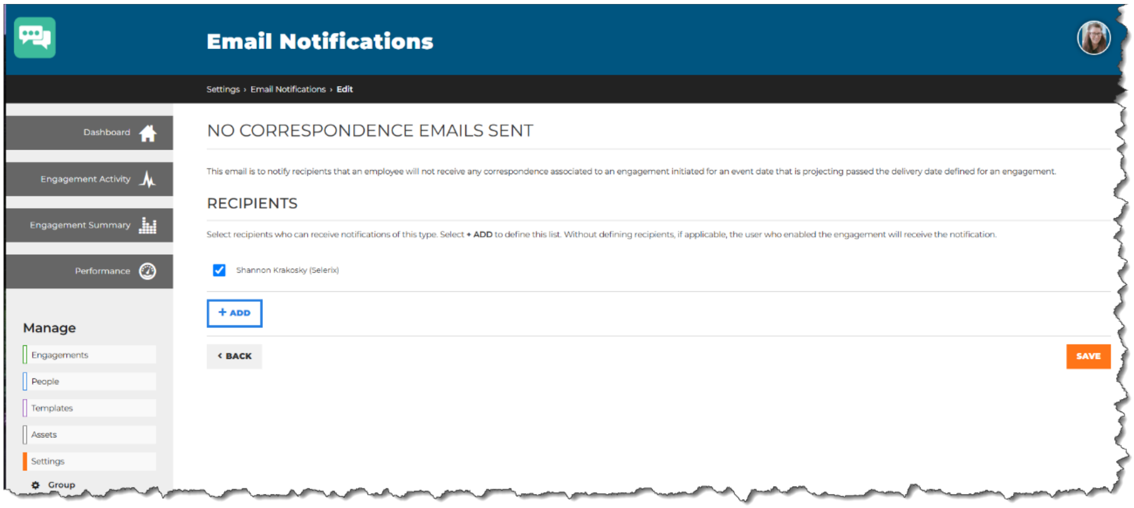
Your Company Code – this code is unique to your case and cannot be changed. You will provide it to employees who are having trouble logging into the Selerix Engage employee portal.

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.

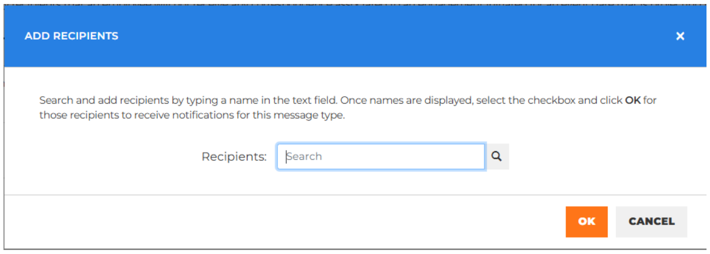
Emails Delivered To – you can select what employee email address to use for email delivery. Your options are:

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.

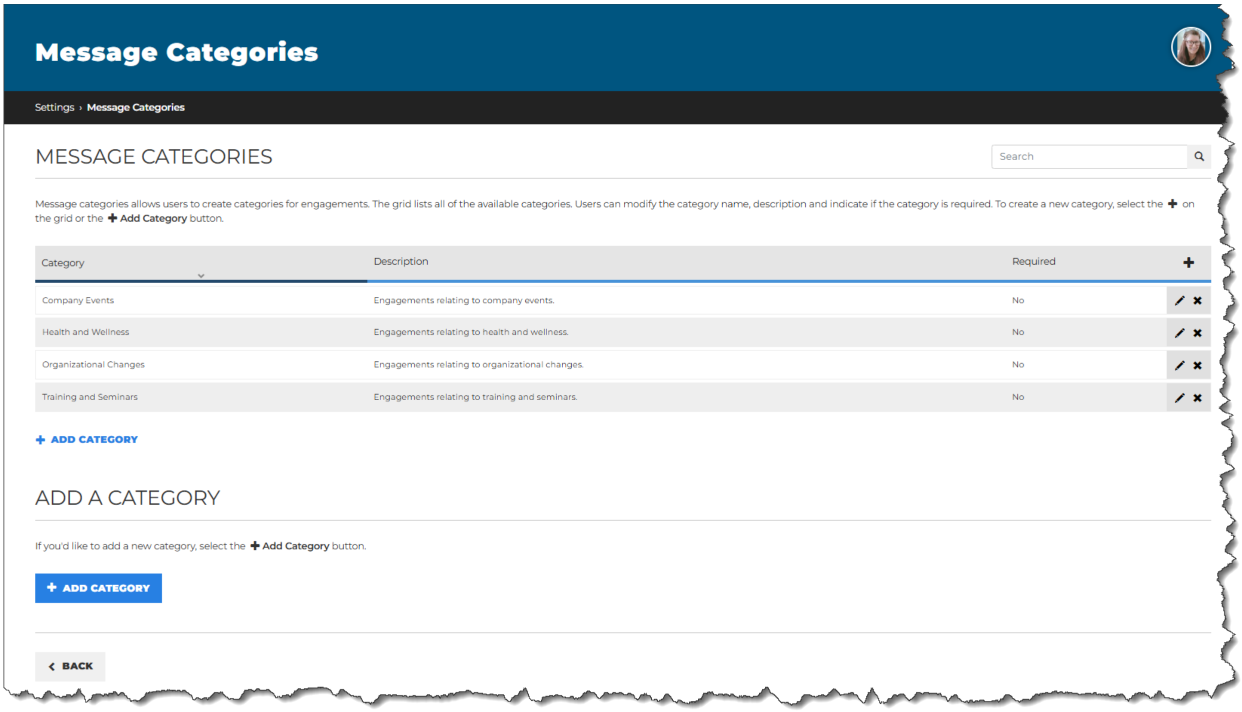


Click the **Add** button to search for an administrative user, select the user and then click **OK**.



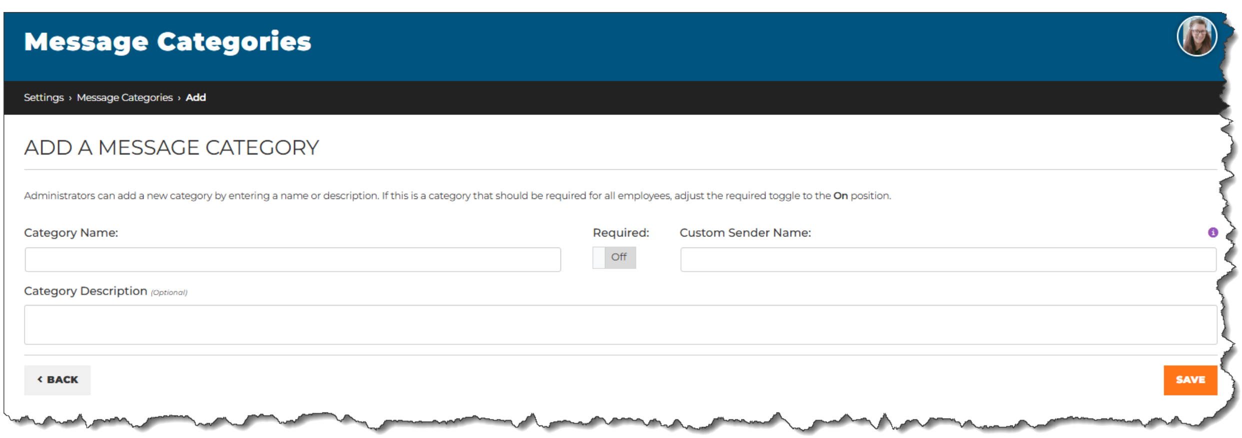
Employee Portal – the Selerix Engage employee portal gives you another way of communicating with your employees via the desktop and mobile browser. Toggle to activate the portal.

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.

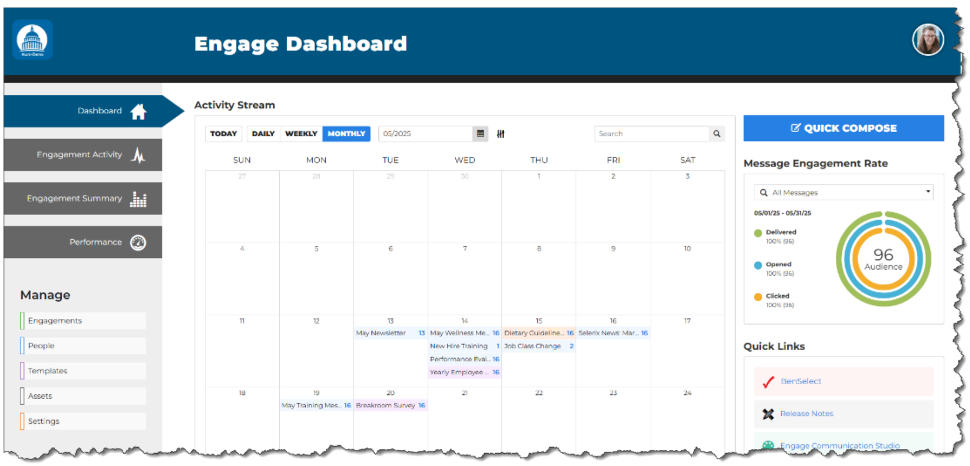
Remember to click on the **Save** button once you’ve made your selections.

Chapter 2: The Engage Dashboard

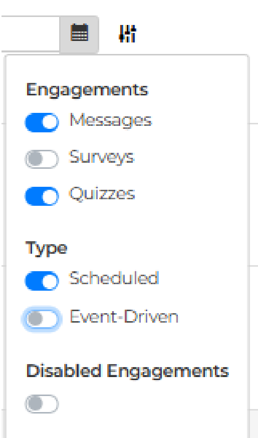
Selerix Engage displays the Engage Dashboard when you login. This Dashboard provides a centralized view of all engagements using the "**Activity Stream**". Message creation is simplified with the **Quick Compose** feature, which allows you to easily select the audience and send out a message in just 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.

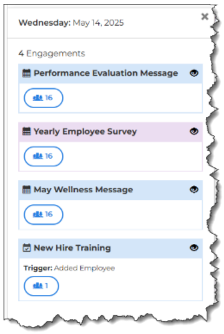


You can also filter by types of Engagements. Use the Filter icon to show the types of Engagements for a selected timeframe.



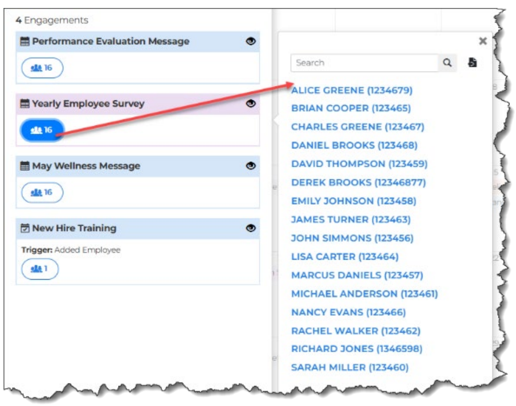
Viewing Engagements

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 16 to view a list of employees who received the message; this list is also searchable if needed.

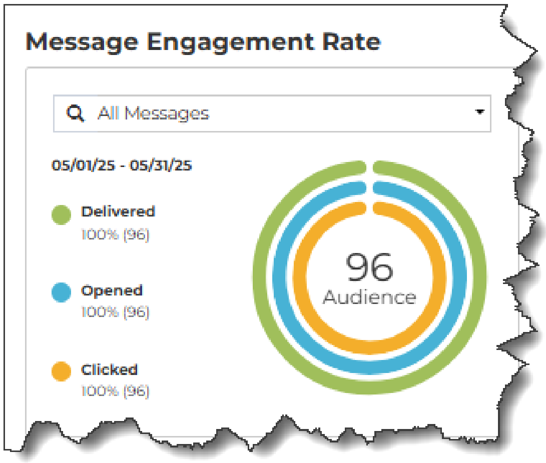


Click on the Export icon to download a file containing both Successes and Failures. The file will show Opens and Clicks on the Success tab, and Failure Reasons and Delivery Attempts on the Failed tab.

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:

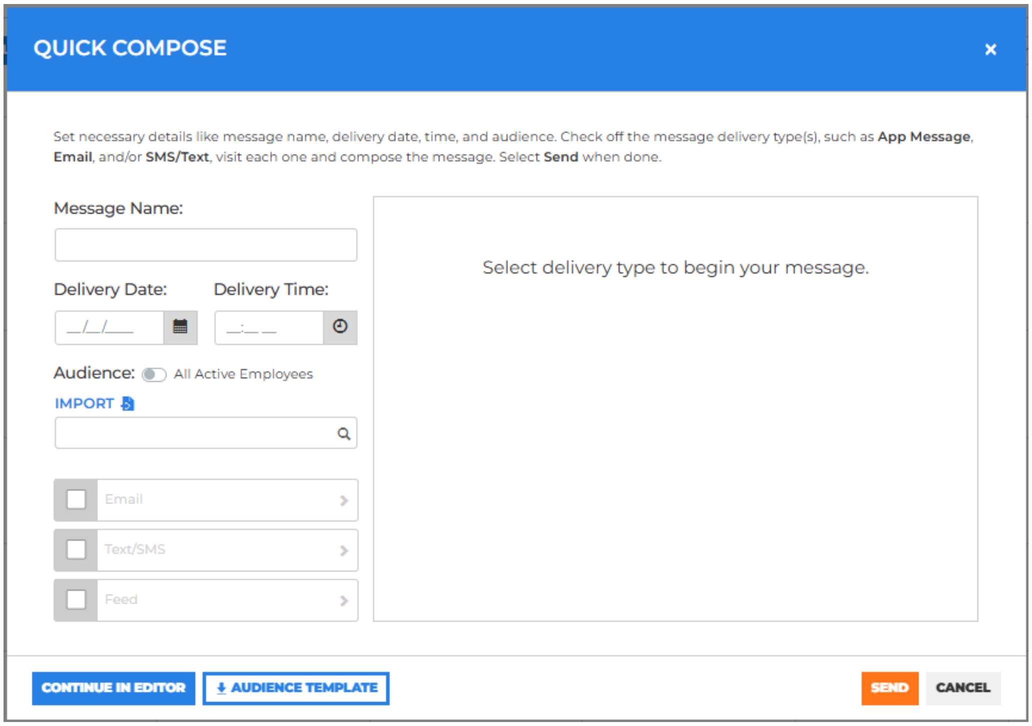
- Delivered – total number of messages delivered
- Opened – total number of messages opened
- Clicked - total number of messages clicked



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.

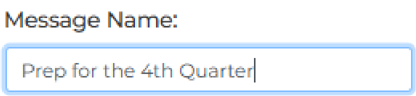


Composing a Quick Message

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

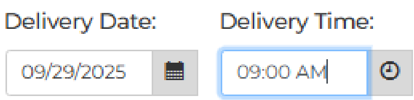
Step 1 – Message Name

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



Step 2 – Delivery

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



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.

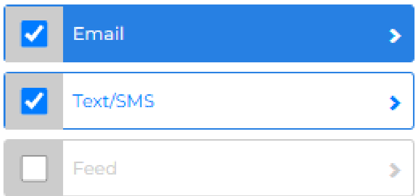
Be sure to include either the SSN or EIDs for each employee to accurately match their employee record.

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.

Step 4 – Select the Message Type

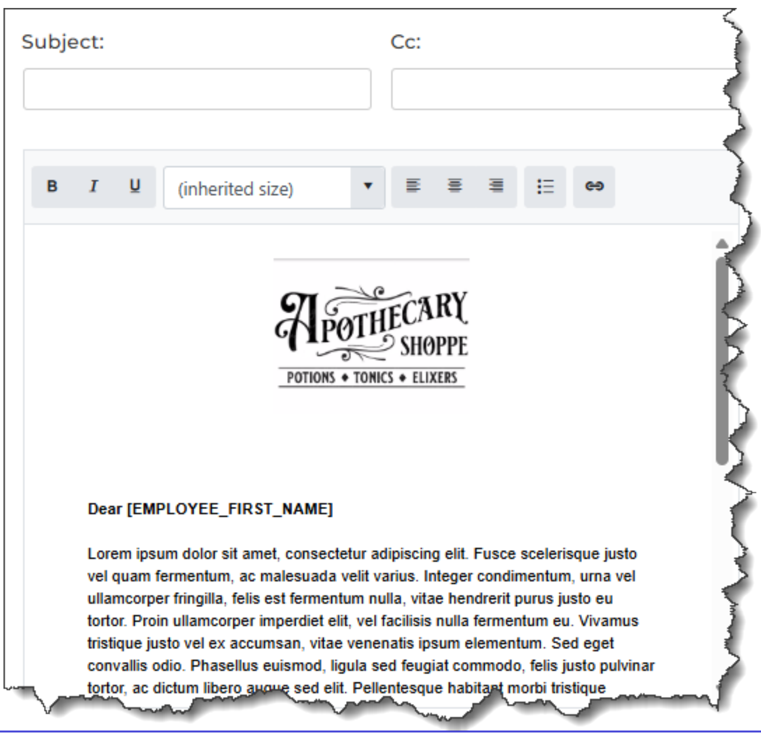
Select email, text, and feed notification based on your communication needs. Each editor displays to the right and provide editing options specific to that message format.



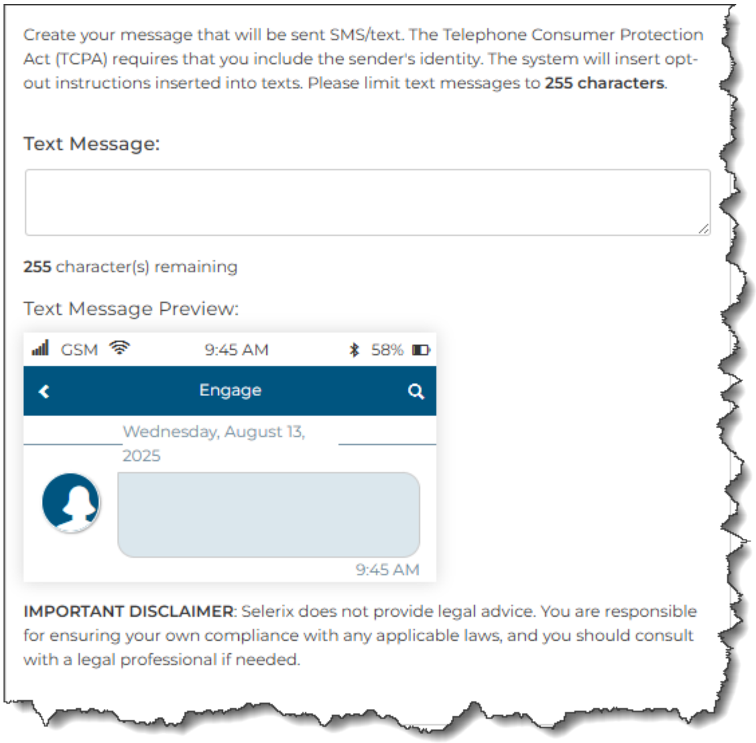
Step 5 – Message Composition Area

Use the Message Composition area to compose your message.

Email Editor: Add the Subject, Cc (if needed), any message formatting, and your message.



Text/SMS Editor: Add the text of the message (limited to 255 characters); the editor provides a preview of the message.



Feed (App Message) Editor: Add a Title and the message; the editor provides a preview of the message.

Step 5 – Send

Click the **Send** button.

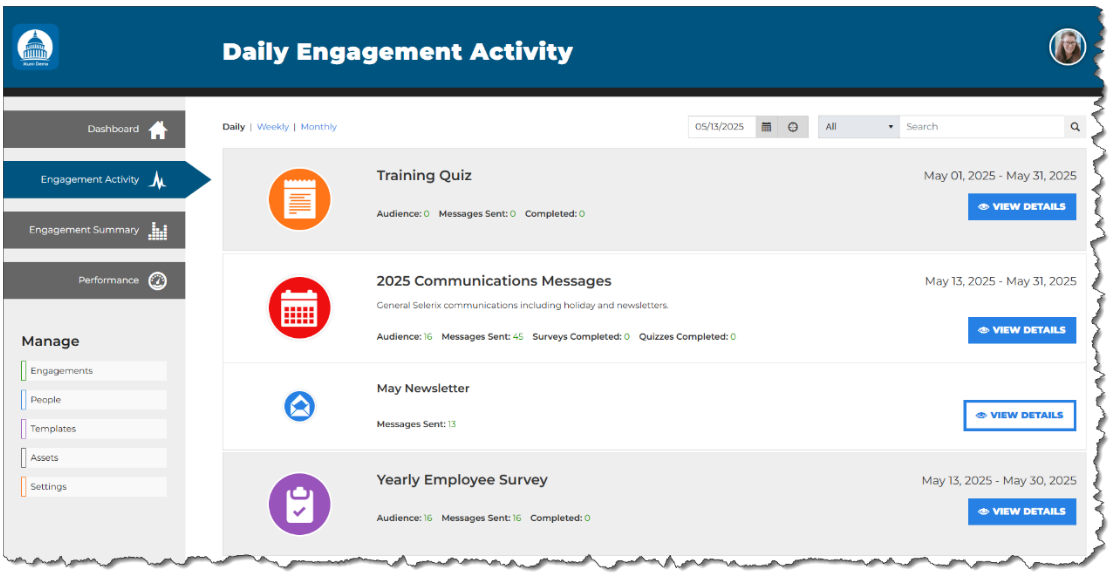
You can always choose to do more in-depth editing/audience selection by clicking the **Continue in Editor** button. 
You must have already provided a Message Name, Delivery Date and Delivery Time to go to the Messages >> Manage > Edit page.

Chapter 3: Performance Metrics

Engagement Activity Page

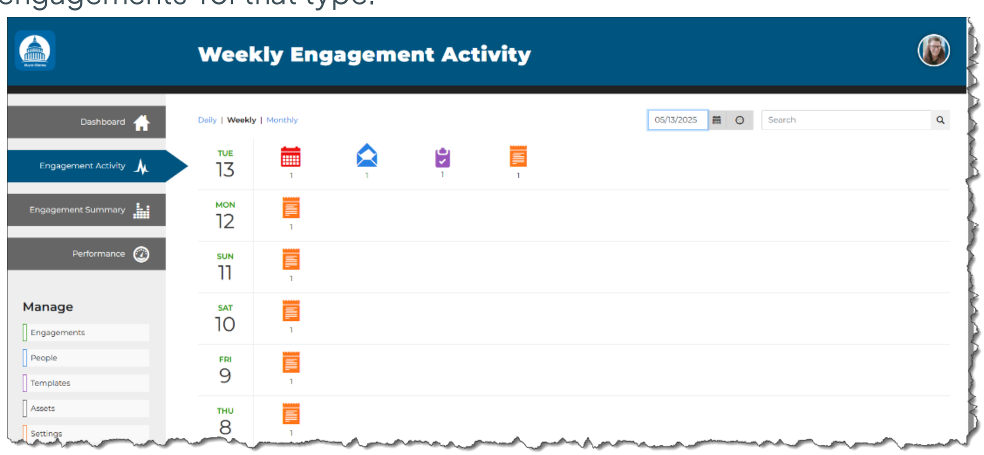
The Engagement Activity page provides details on all active engagements on a daily, weekly or monthly basis. You can also search activity on a historical basis by selecting the date in the upper right-hand corner of the page. Use the combination of date and search bar to make your search more specific.

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.

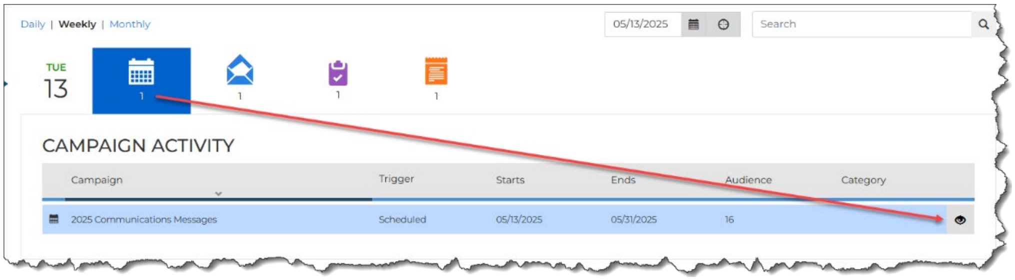


2. **Weekly view** – This view shows all active engagements for the current day and the previous six days if any engagements were active.
Icons represent different engagement types you can create, and the number beneath each one shows how many instances of that type were active on that specific day.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

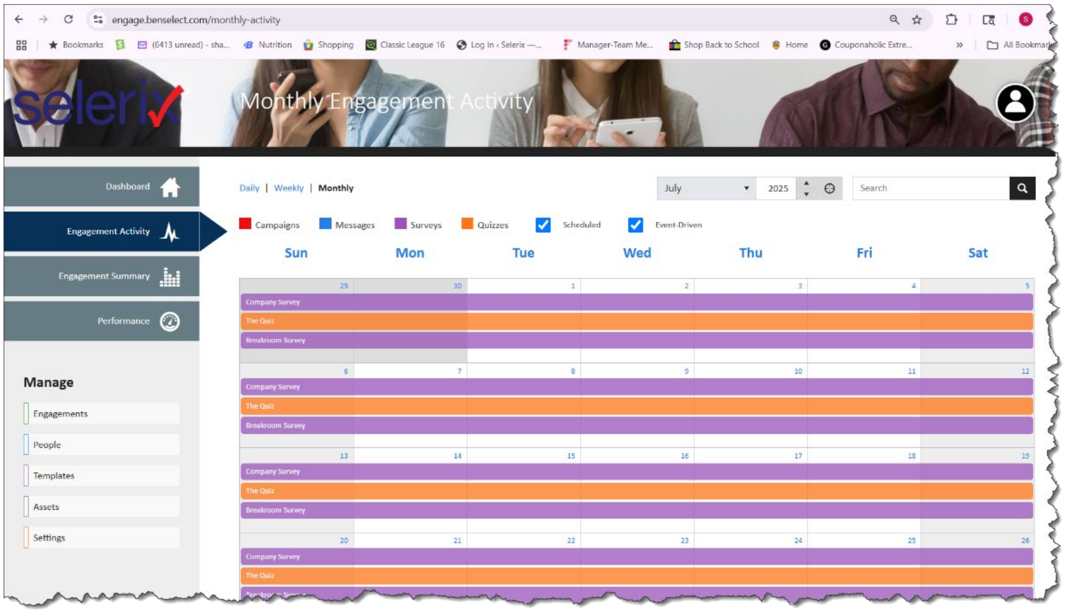
Campaign
Message
Survey
Quiz



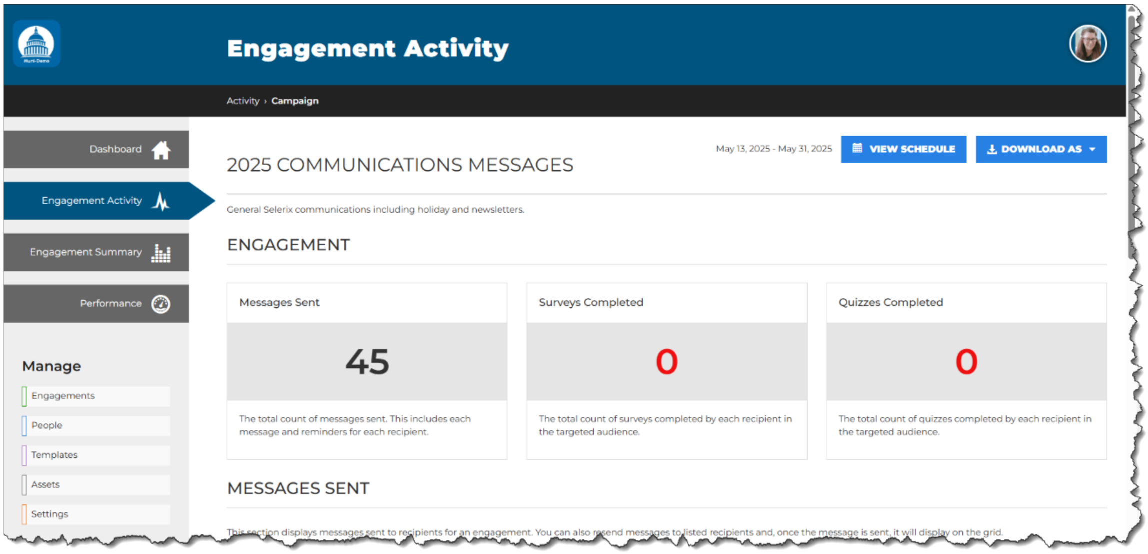
Click on the View icon to the right of each engagement to view details.



3. **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.

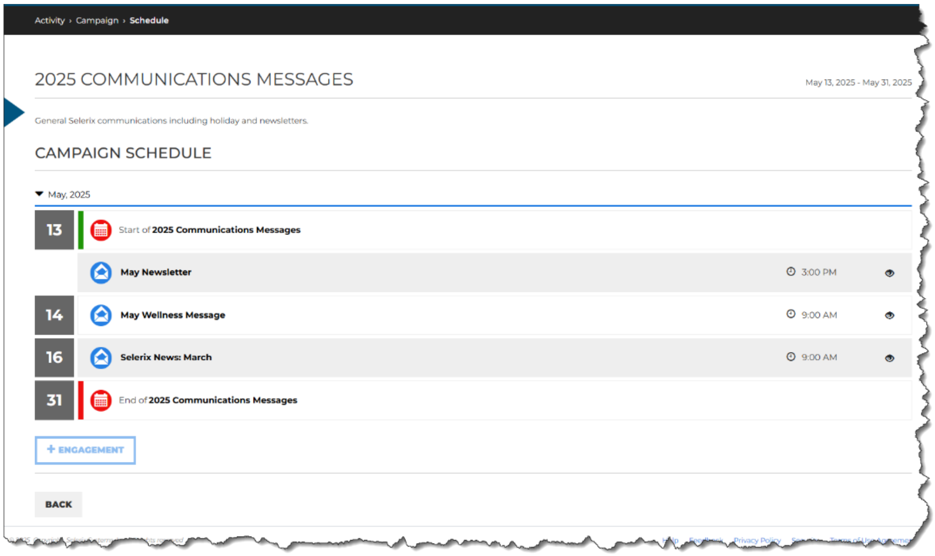


View Details – Click the View Details button or the View icon to open the View Details page for your engagement such as messages sent, message failures and surveys or quizzes completed.



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.

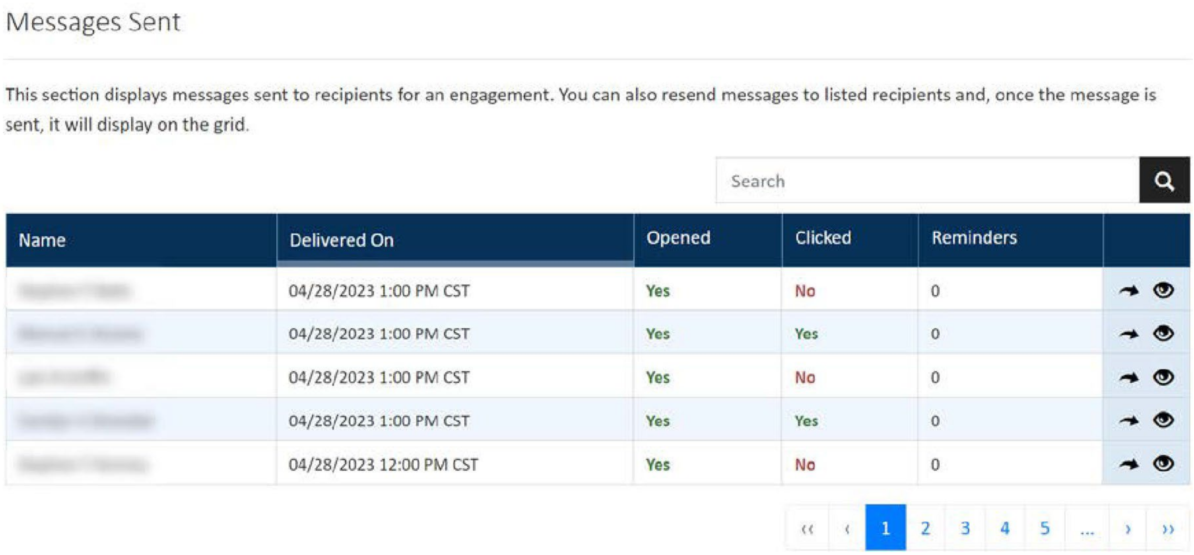


You can use the +Engagement button to add a new engagement.

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 Failed section – This section shows a table list of all individuals who failed to receive the message. The tabled 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

Search

	Name	Message	Delivery Attempt	Reason	
	[illegible]	Selerix News: April	04/28/2023 1:00 PM CST	Email got dropped.	
	[illegible]	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.	
	[illegible]	Selerix News: April	04/28/2023 11:00 AM CST	Incorrect Phone Format.	
	[illegible]	Selerix News: April	04/28/2023 11:00 AM CST	Incorrect Phone Format.	
	[illegible]	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

Search

Name	Completed on	Passed	Score	
No Quizzes found.				

Surveys Completed

Search

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."

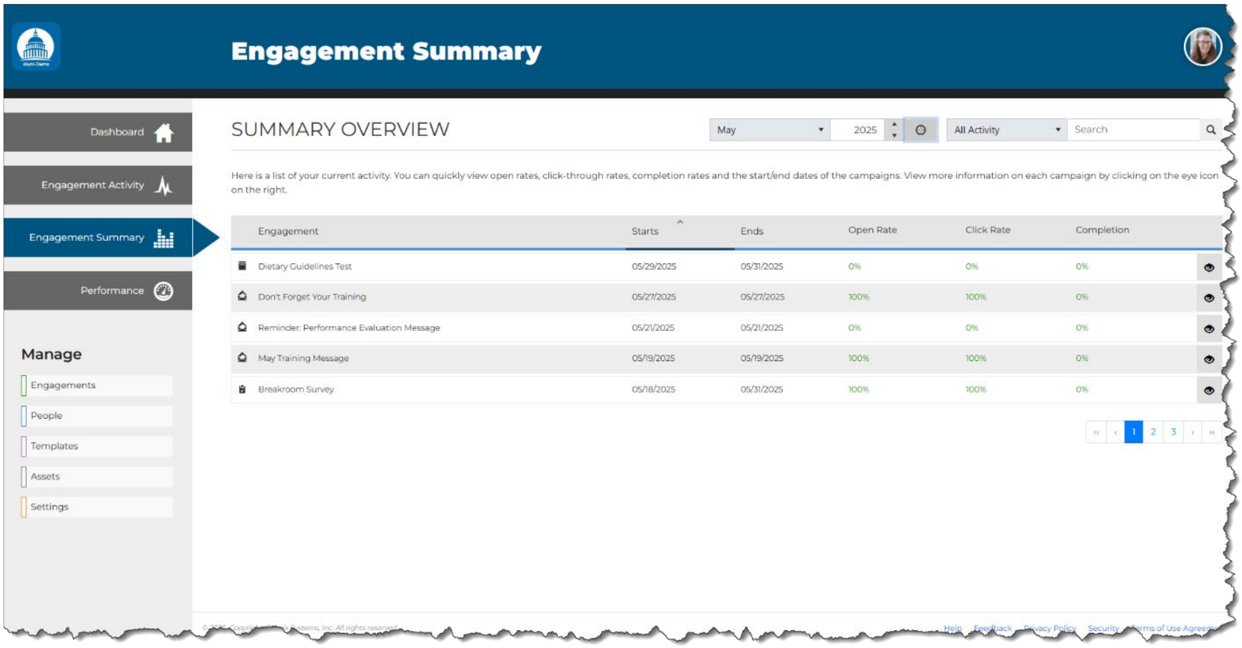
To see a summary of how your employees answered your quizzes and surveys overall, go to the **Performance Page** section in this user guide.

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.

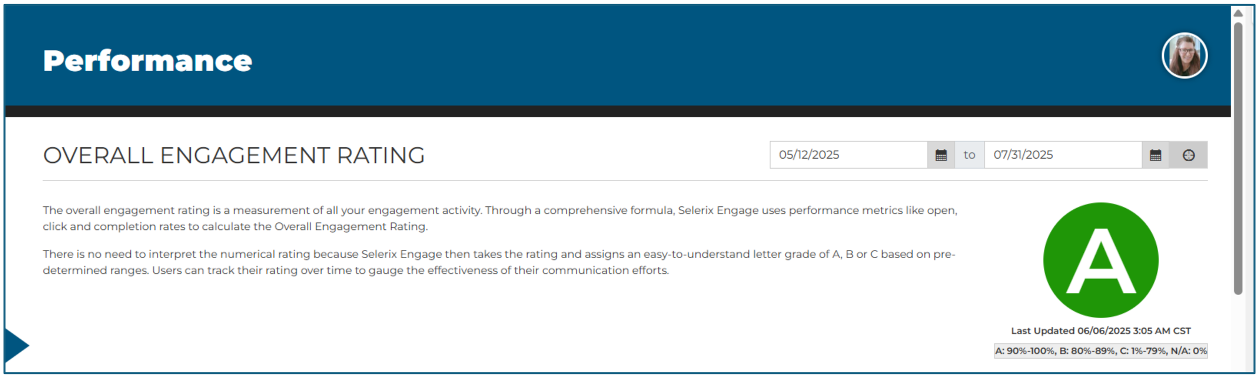
The page is divided into three sections:

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%



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.

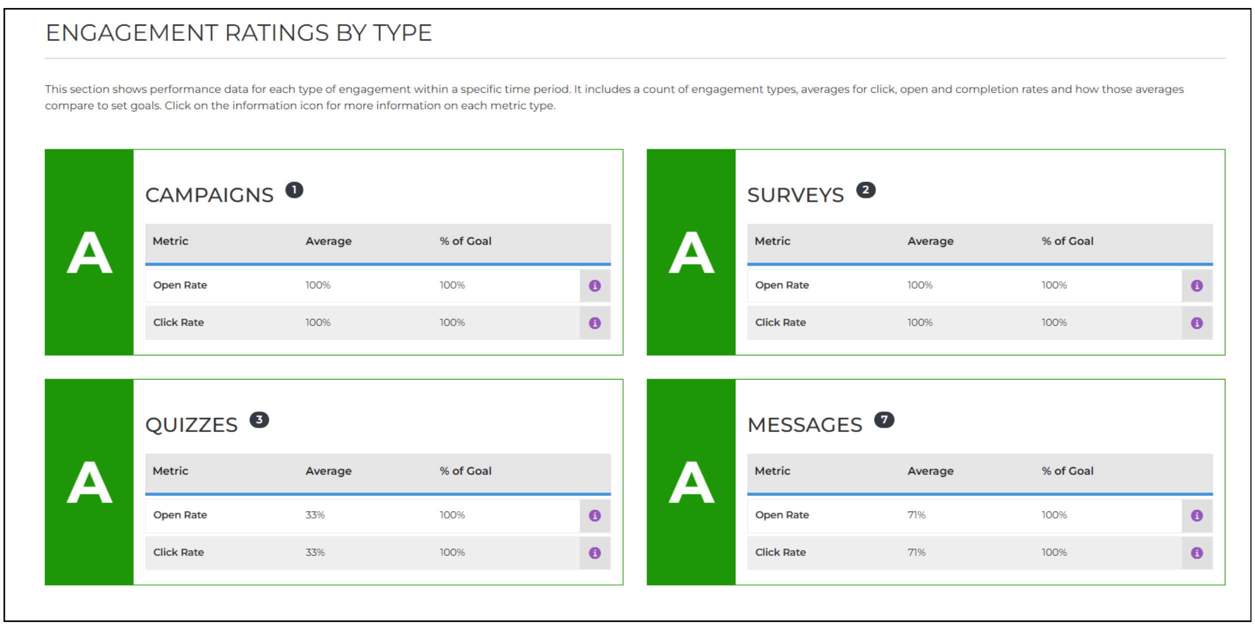
Performance Metrics:

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.



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

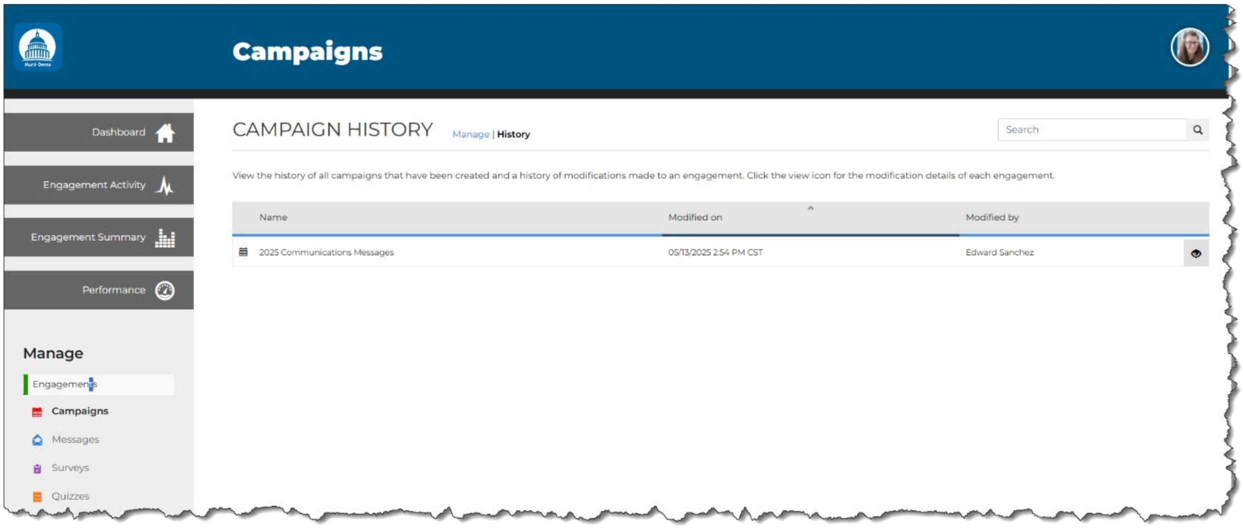
Column	Contents	Details
Type	Campaign Type	Displays an icon for **Scheduled** or **Event-Driven** campaigns.
Title	Campaign Name	Shows the name/title of the campaign.
Trigger	Activation Method	Indicates whether the campaign is **Scheduled** or triggered by an event (e.g., **New Hire**).
Start Date	Launch 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.

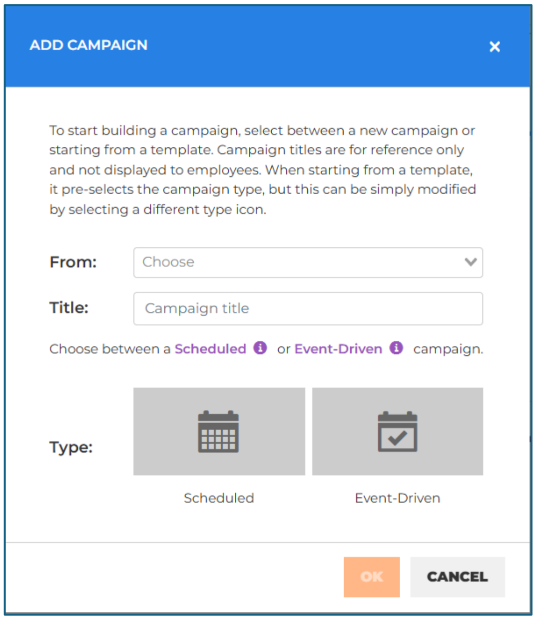


Campaign History Overview

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.



The following instructions walk you through creating a 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**.

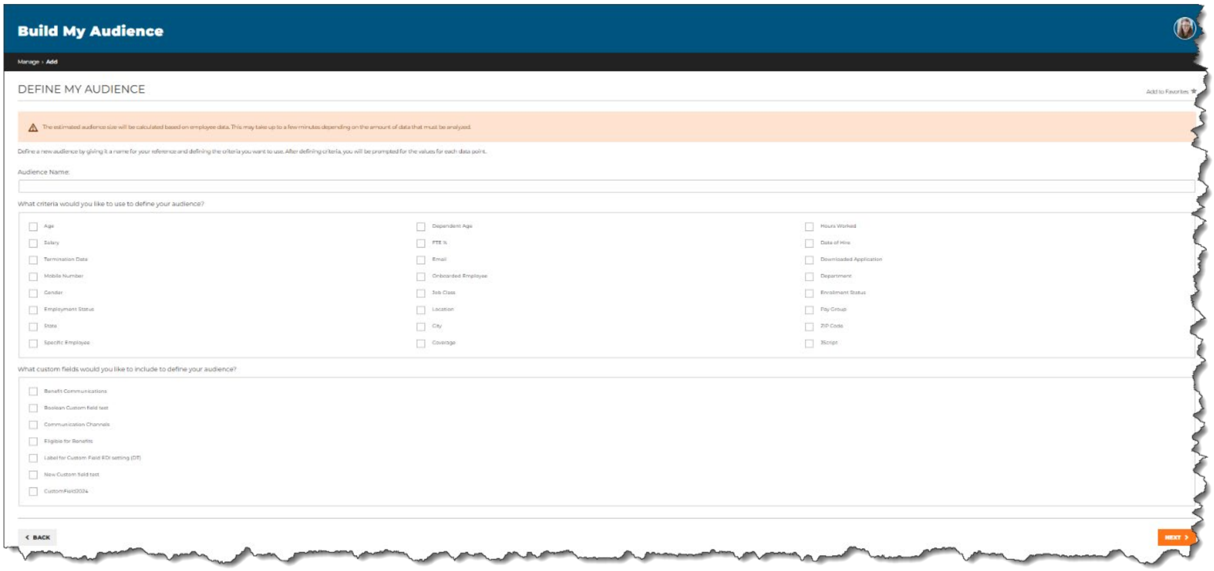
Step 2 – Getting Started

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**. **Note:** 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 **+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 **New Audience** button to create a custom audience. Clicking the **Add 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 **Save** 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 **Next**.
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 **Next**.
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 **Next**.

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

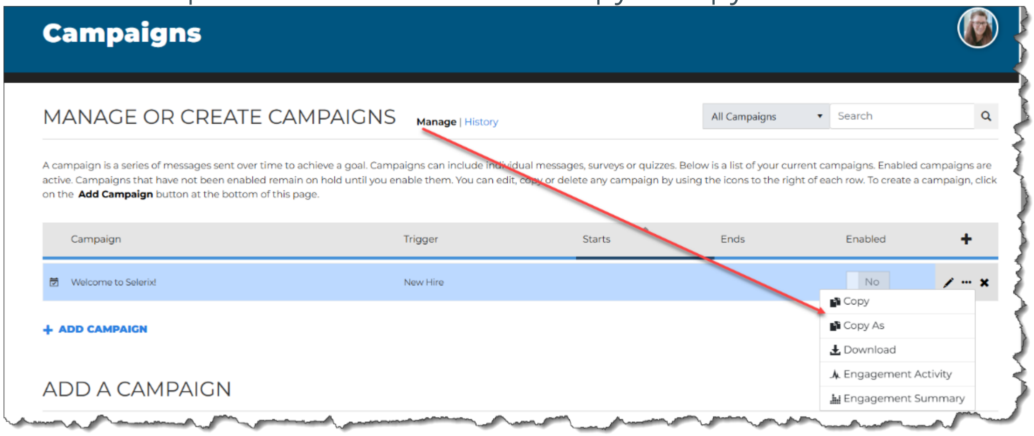
You can enable the campaign if it is ready to deploy or save the campaign as disabled if it is not ready to deploy.

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.

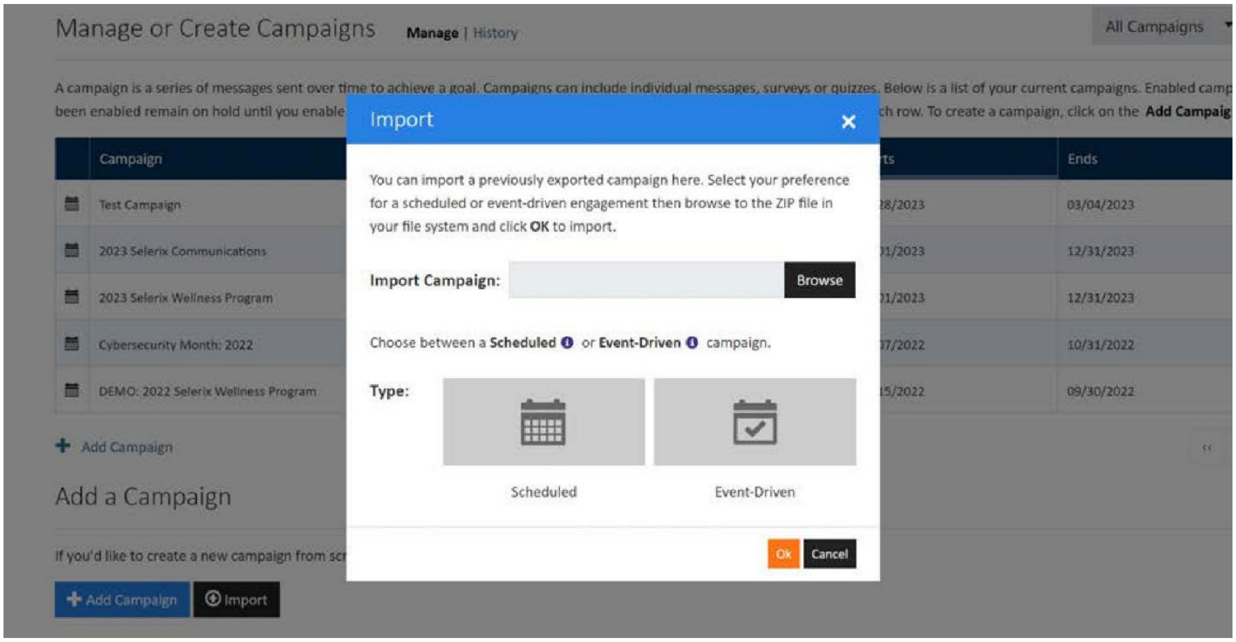
Step 1

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 **Engagements** section to open the **Manage or Create 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).
Enabled	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 message.
- ◎ **View Icon** – Appears when the message is **enabled**. Click to view the message 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

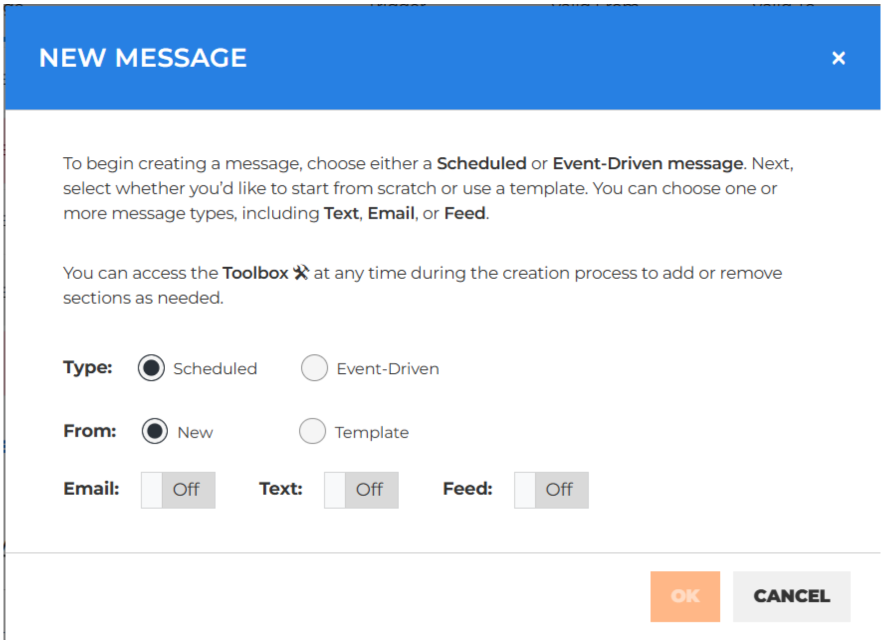
To create a new message, begin by clicking **+ Add Message**. You can also copy an existing message or import a message from another case or source. See the Copying a Message or Importing a Message sections for more information.

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.

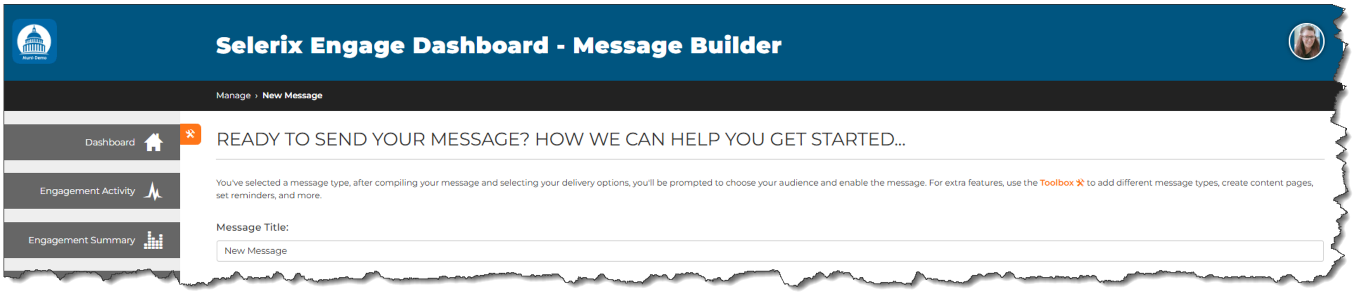


Step 2 – Select Options

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.



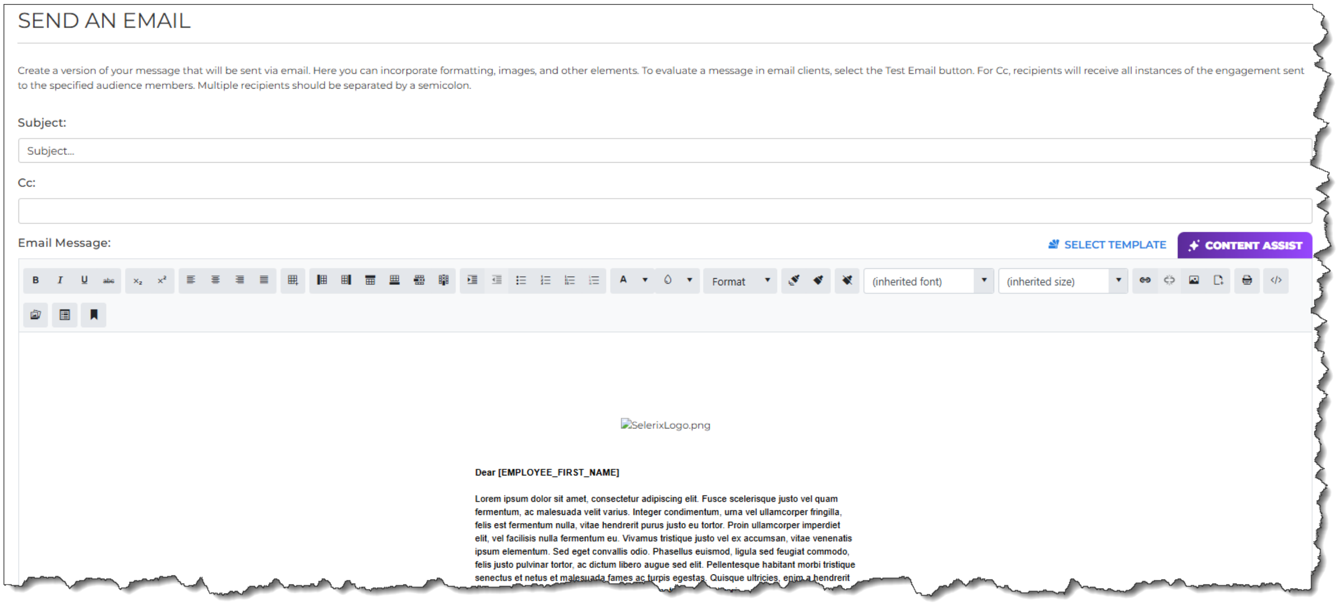
Step 3 – Name Your Message

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:

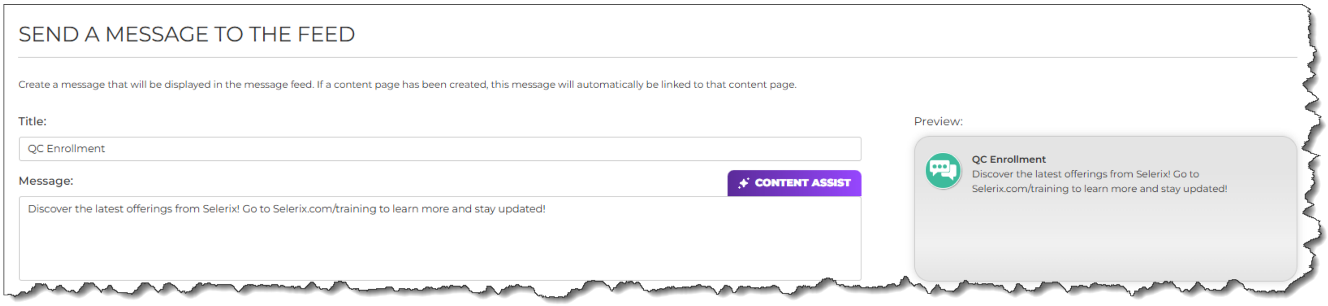
1. Enter content directly into the email editor using the available editing tools.
2. Click on the HTML editor button to open the HTML editor. You can then paste your HTML code into the editor. After entering the HTML, click on the T button for a preview of the content page.
3. Click **Content Assist** 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.

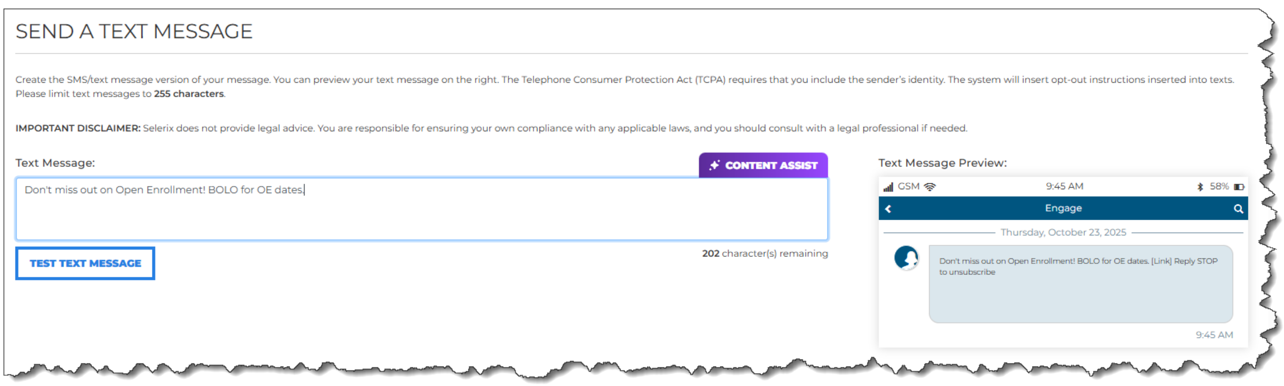
Content Assist is also available for help in message creation, although you cannot upload a file.



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.



Step 7a – Select Delivery Settings – Scheduled Messages

Select the Delivery Date and Time.

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

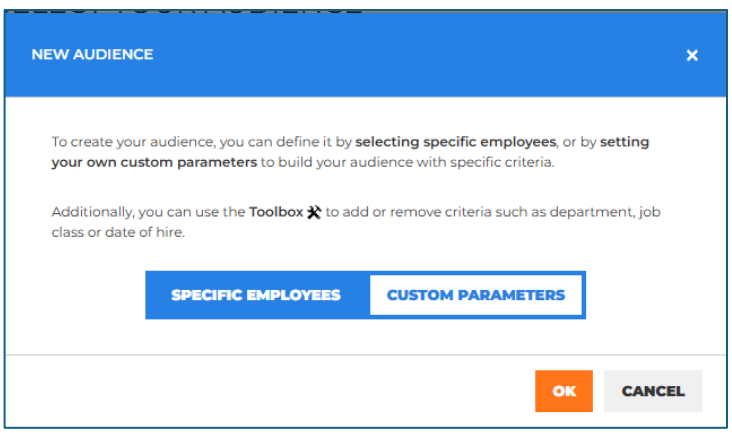
If you selected Event-Driven, select the Starts and Ends date, Trigger, and the Delivery Date and delivery Time.

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.

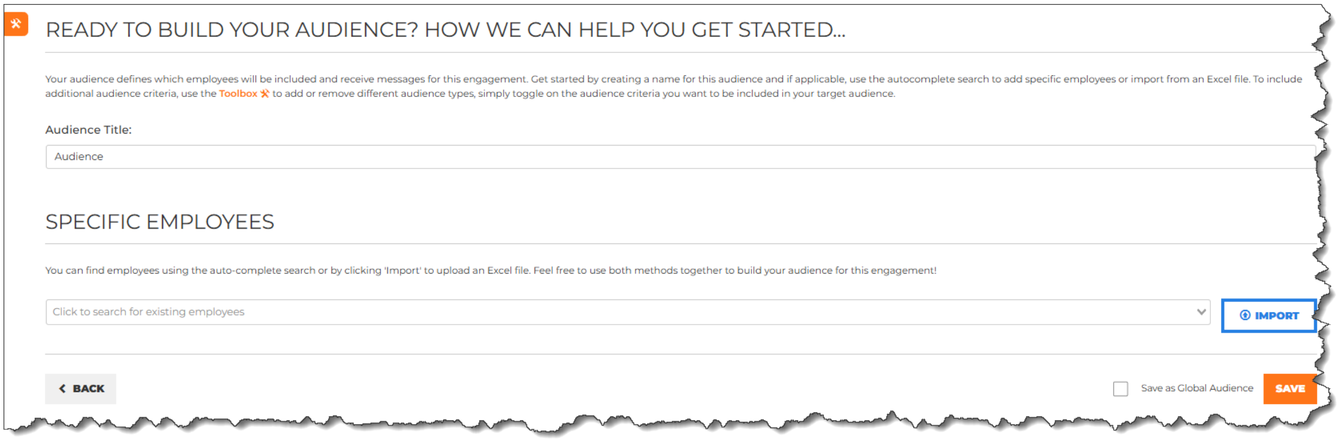
Click on the **+Audience** button to create a new custom audience or add a global audience. The New Audience dialog box opens.



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

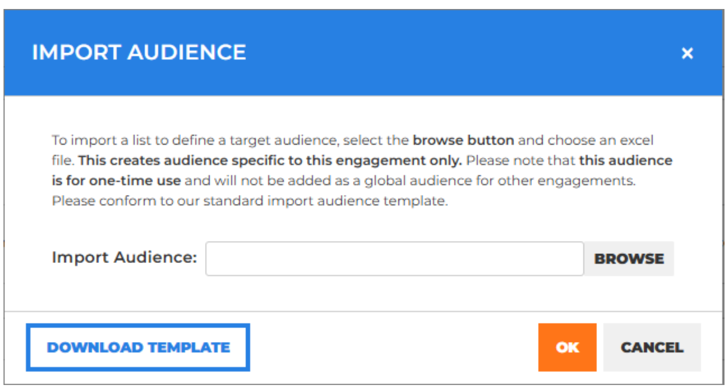
Custom Parameters – Click this button to select an audience from the most-used options. .

Step 8a – Building an Audience – Specific Employees



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 **Save** button.

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

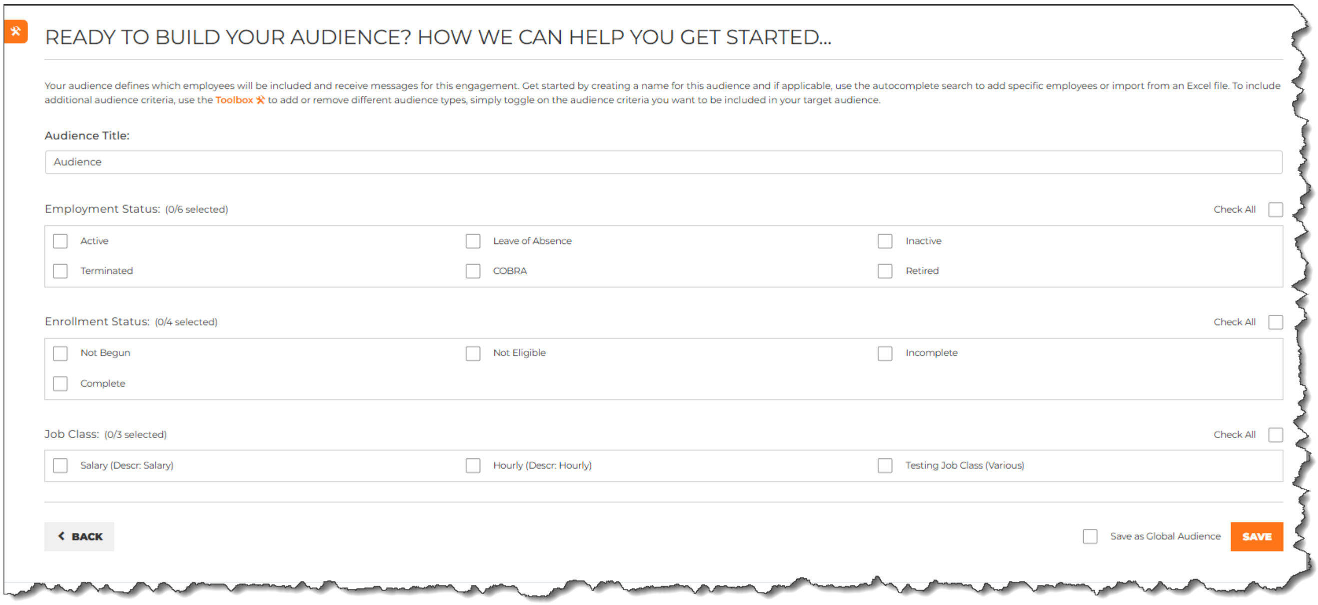


1. Click the **Browse** button to select an audience file for import. The template is available by clicking **DownLoad Template**.
2. Click **OK**.

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.



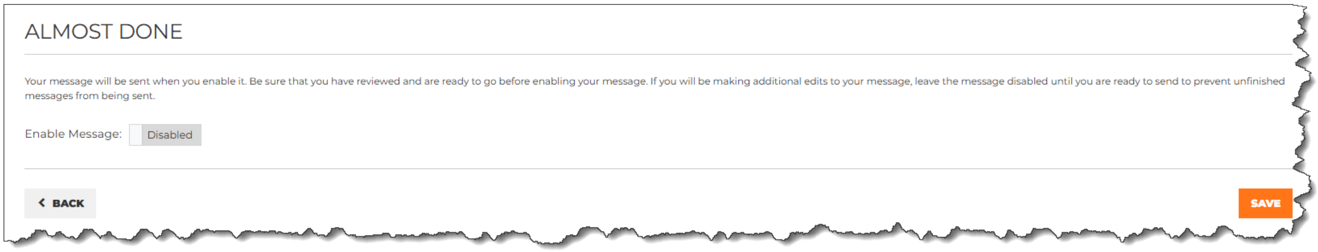
Click the **Save** button when you complete your selections.

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.

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.



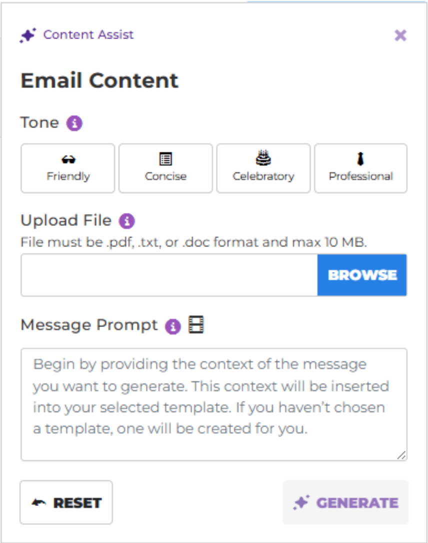
Using Content Assist

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.



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

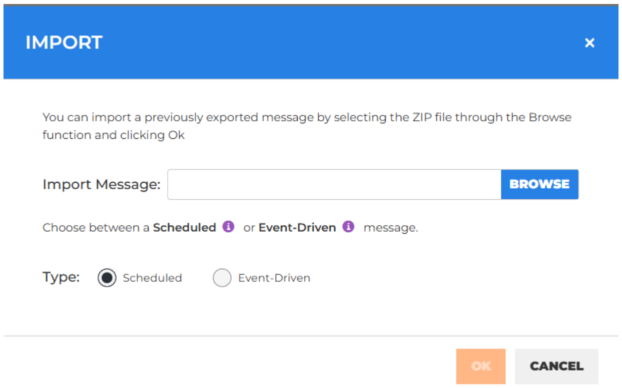
Importing a message is a two-step process. First, you will need to export the message from the case where it was created (case 1). Second, you will need to log into the case in which you want to use the message (case 2) to import it.

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.

Surveys

Click **Surveys** under the **Engagements** section to open the **Manage or Create Surveys** 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 survey begins.
End Date	Completion Timing	The date the survey ends.
Status	Enabled/Disabled	Shows whether the survey is currently active or inactive.
Actions	Interaction Options	Includes icons and menu options for managing the survey.

Column 7: Actions Explained

- **Pencil Icon** – Appears when the survey is **disabled**. Click to edit the survey.
- **View Icon** – Appears when the survey is **enabled**. Click to view the survey in **read-only** mode.
- ⋯ **Ellipsis Menu** – Opens additional options:
    - **Copy** – Duplicates the survey with its current type (Scheduled or Event-Driven).
    - **Copy As** – Duplicates the survey and lets you change its type.
    - **Download** – Exports the survey 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).

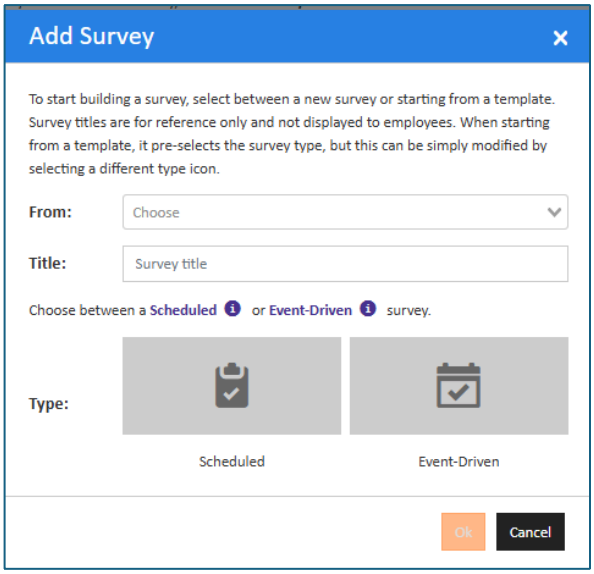
Creating New Surveys

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.

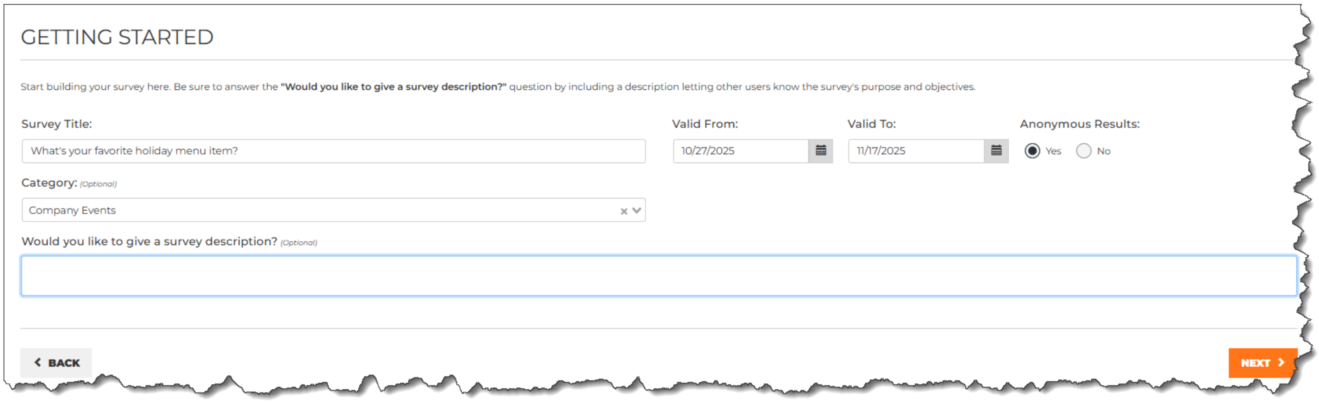


In the From drop-down list, select **Create New** or Template.

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

Step 2 – Getting Started

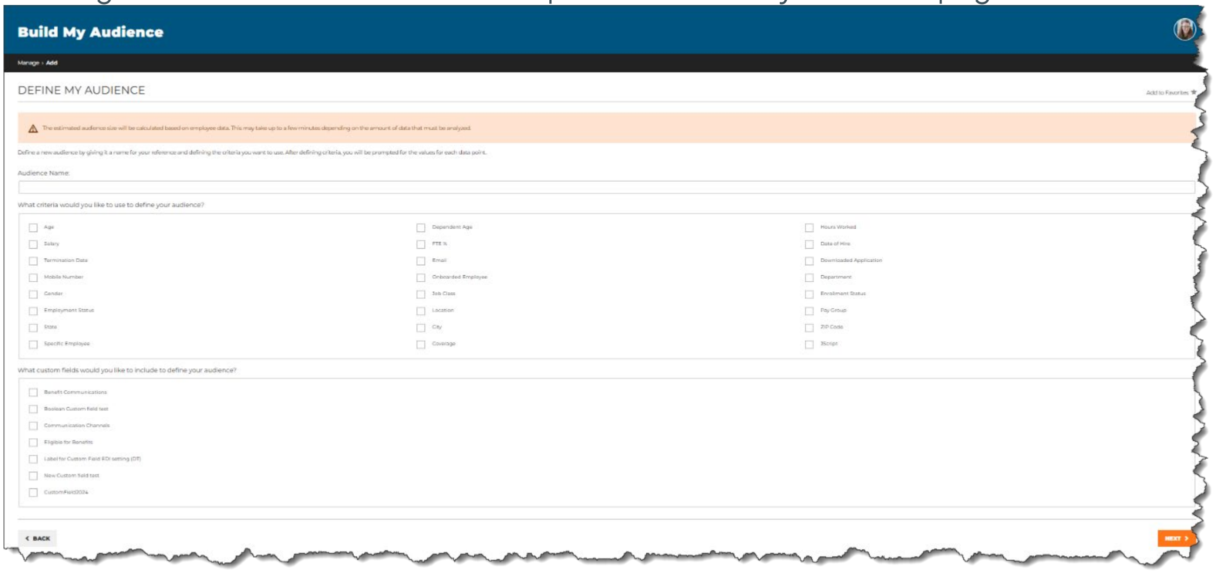
Enter the Valid From and Valid To dates, indicate if it will be anonymous, select a category (optional), and enter a message description (optional).



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 **+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 **New Audience** button to create a custom audience. Clicking the **Add 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 **Save** 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 **Engagements** section to open the **Manage or Create 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.
Enabled	Enabled/Disabled	Shows whether the quiz is currently active or inactive.
Actions	Interaction Options	Includes icons and menu options for managing the quiz.

Column 7: Actions Explained

- **Pencil Icon** – Appears when the quiz is **disabled**. Click to edit the quiz.
- **View Icon** – Appears when the quiz is **enabled**. Click to view the quiz in **read-only** mode.
- ··· **Ellipsis Menu** – Opens additional options:
  - **Copy** – Duplicates the quiz with its current type (Scheduled or Event-Driven).
  - **Copy As** – Duplicates the quiz and lets you change its type.
  - **Download** – Exports the quiz 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

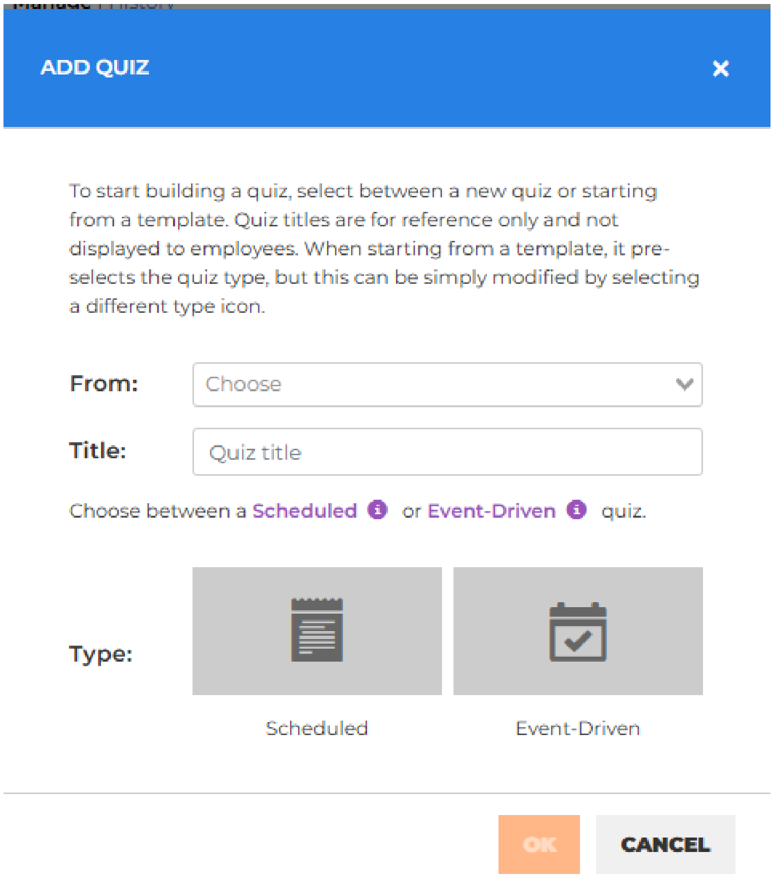
To create a new quiz, begin by clicking **+ Add Quiz.** You can also copy an existing quiz or import a quiz from another case or source. See the Copying a Quiz or Importing a Quiz sections.

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.



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 A**s. 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 withing 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.

Note: Events must occur after the campaign has been enabled and within the assigned date range to be counted. This applies regardless of the event's original date.

Engagement Templates

Need a hand with your communications? We've got a library full of ready-to-use templates! This includes everything from full campaigns and surveys to content pages and emails. Just grab what you need, drop it into your engagement, and tweak it to fit.

Template options are available in the the Templates section. You can preview, copy, edit, or even import your own creations into the appropriate are within the Templates section. To create your own templates, see Chapter 5: Using Templates.

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 **Ok**.

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

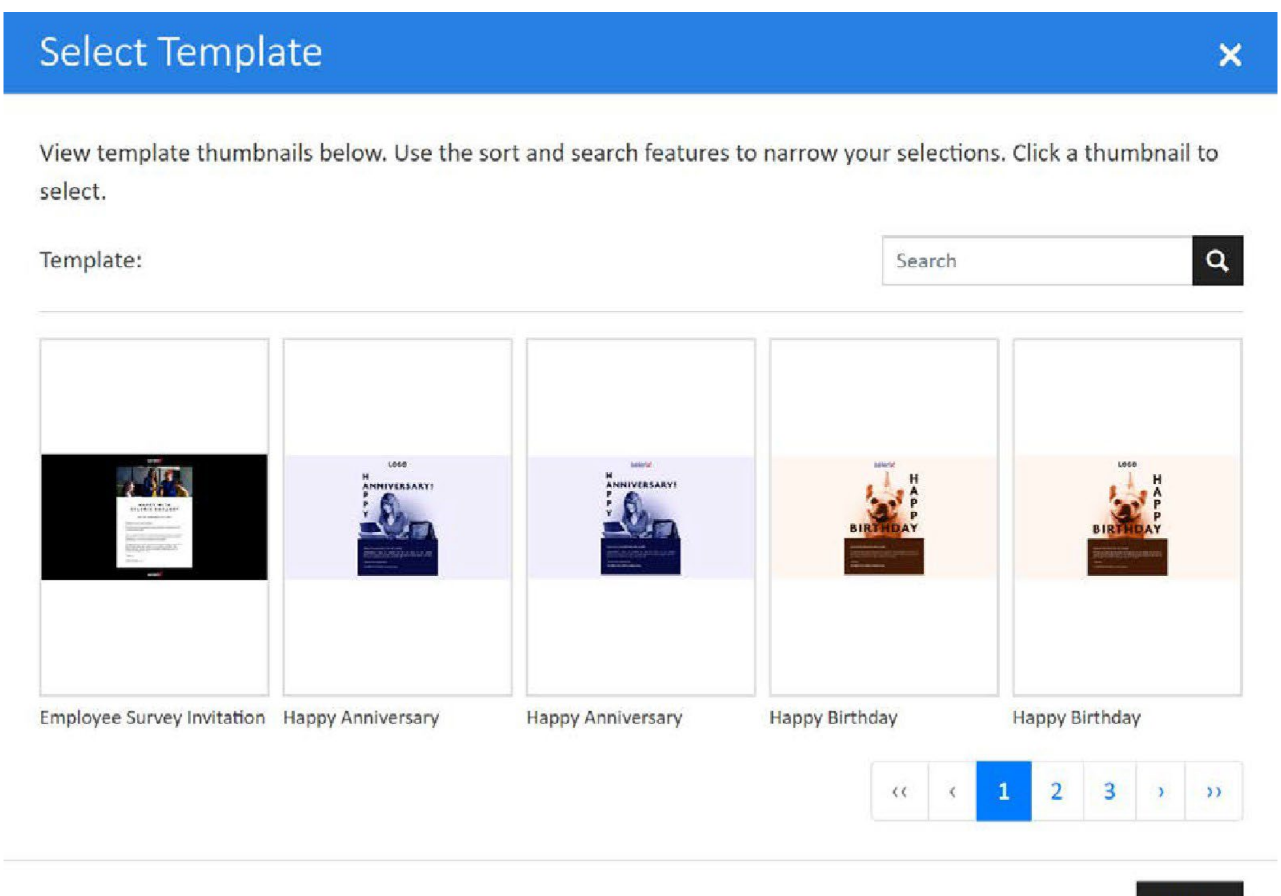
Click “Select Template,” and a box will open with a preview of the available templates. Select the one that best suits your desired layout, and the content will populate in the editor.

Step 3

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

Step 4

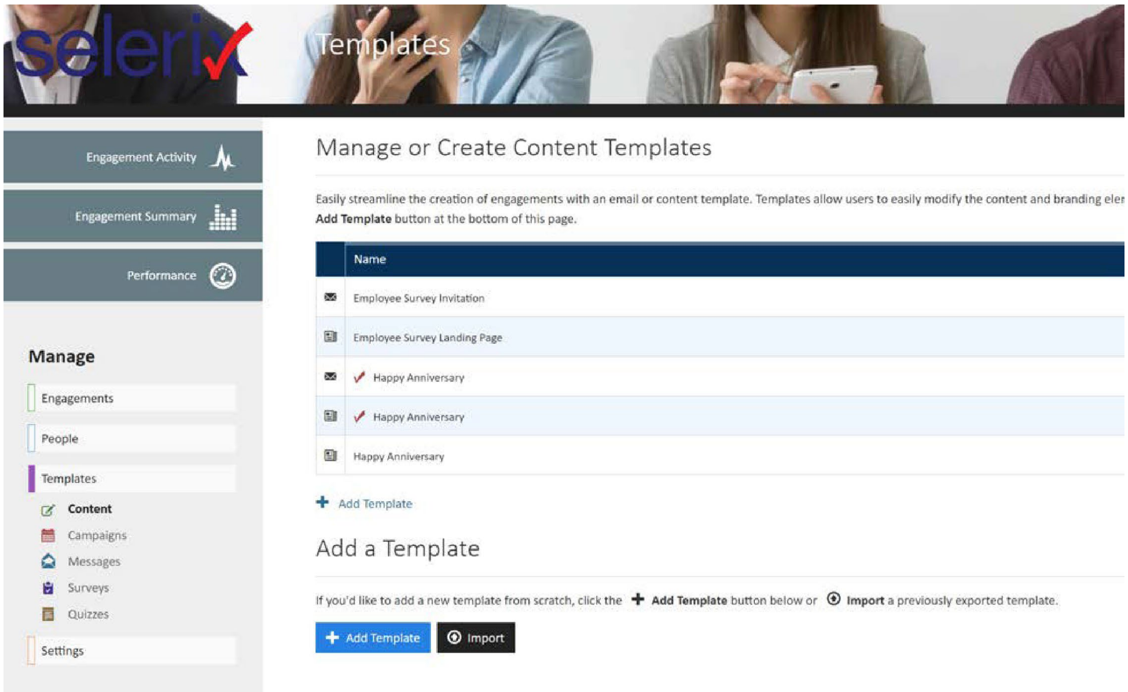
Click Next and continue building your engagement. Repeat the previous steps to select an email template.



Chapter 5: Using Templates

Templates can make using Engage quicker and easier; you can save these templates for use in future communications. 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.



CONTENT TEMPLATES

Click **Content** under the **Templates** 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.

Campaign Templates Table Overview

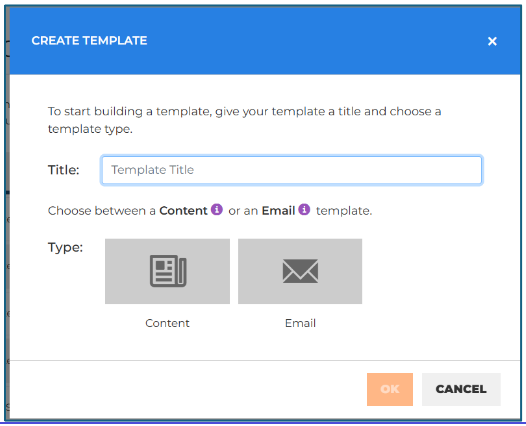
Column	Contents	Details
Type	Type of template	Displays an icon for **Scheduled** or **Event-Driven** template.
Name	Template Name	Shows the name/title of the template.
Category	Template Category	Indicates the category of the template, if provided.
Enabled	Enabled/Disabled	Shows whether the campaign is currently active or inactive.
Actions	Interaction Options	Includes icons and menu options for managing the campaign.

Column 7: Actions Explained

- ✔ **Default Icon** –Click to set the content as a default for that type of template.
- **View Icon** – Appears when the template is **enabled**. Click to view the template in **read-only** mode.
- ⋯ **Ellipsis Menu** – Opens additional options:
    - **Copy** – Copy to create and edit, if needed, the base template.
    - **Download** – Exports the template to your download folder for use in another case.

Creating New Content Templates

To create a new Content template, begin by clicking + Add Template on the **Manage or Create Content Templates** page. 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.



Step 1

Give the template a title and indicate if it is a content page or email template and then click **OK**.

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.

Click **Save** when finished.

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.

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.

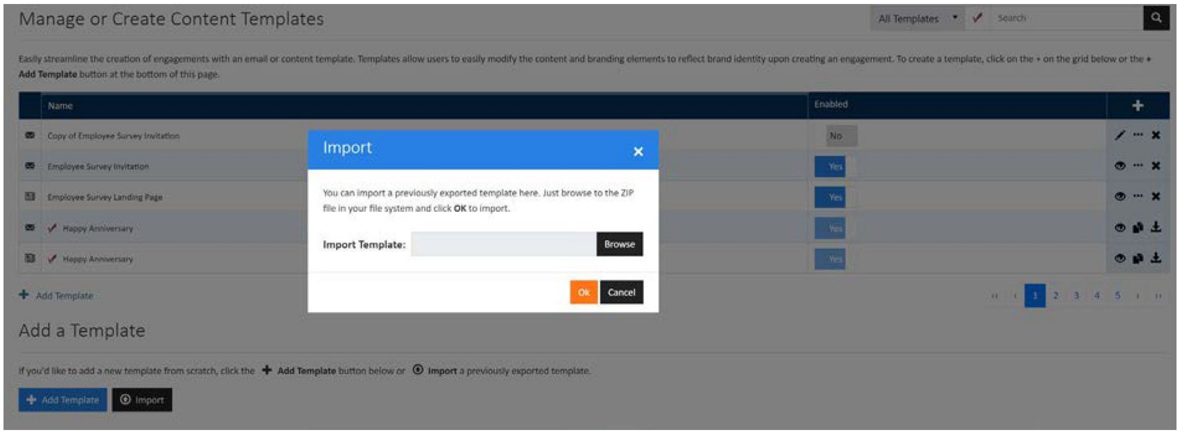
Step 1

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

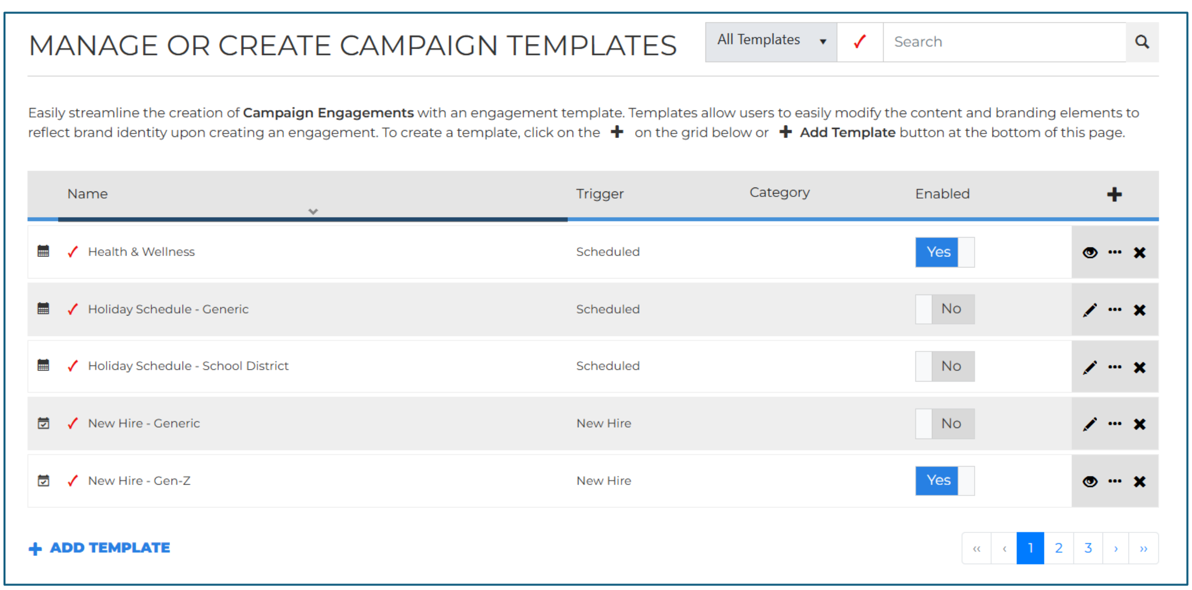
Click **Campaigns** under the **Templates** section to open the **Manage or Create Campaign Templates** page. Existing templates display in the table—you can scroll through pages or use the search bar to find a specific one.

Campaign Templates Table Overview

Column	Contents	Details
Type	Campaign Template Type	Displays an icon for **Scheduled** or **Event-Driven** campaign templates.
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**).
Category	Category of Template	Indicates the category of the template, if provided.
Enabled	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).
  - **Download** – Exports the campaign to your download folder for use in another case.



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

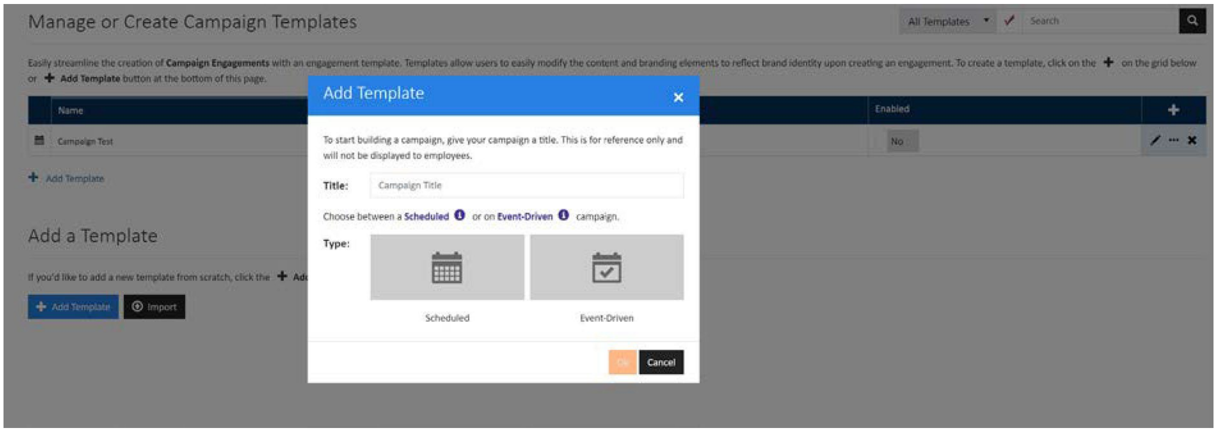
Give the campaign a title and indicate if it is scheduled or event driven.

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 **Yes** and add users who can manage the template. Select **No** 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 **Next**.

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 **Next**.

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 **Next**.

Step 5 – Almost Done

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

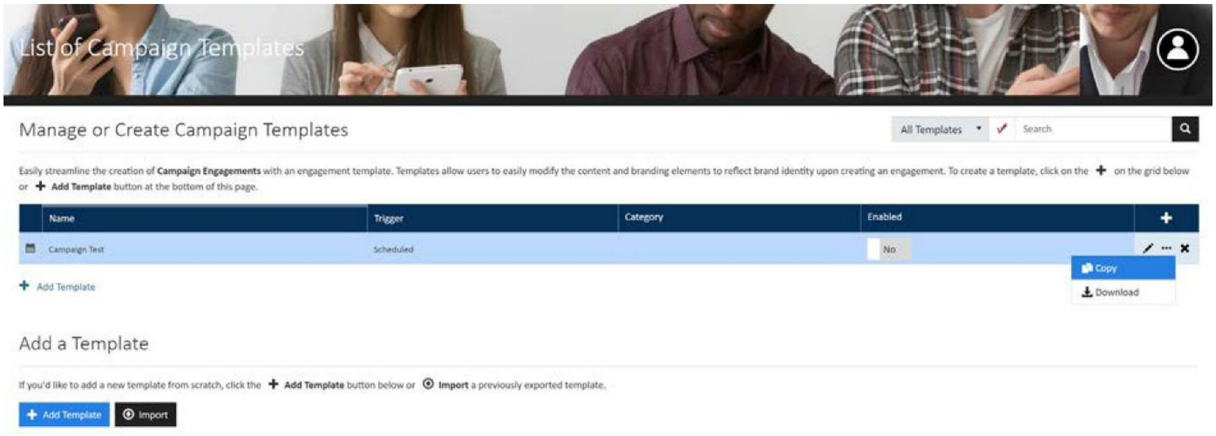
Copying a Campaign Template

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.

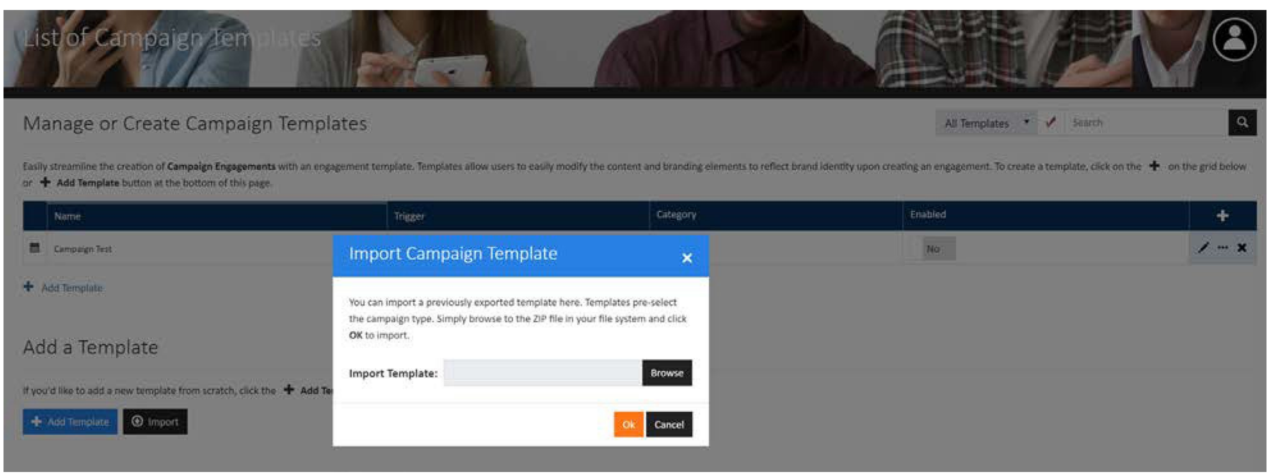
Step 2

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.

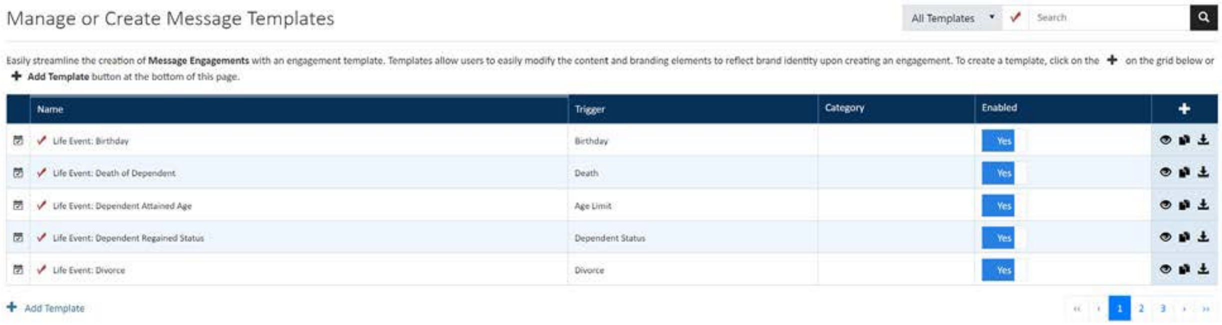
Column six contains several options from which you can select.

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.



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

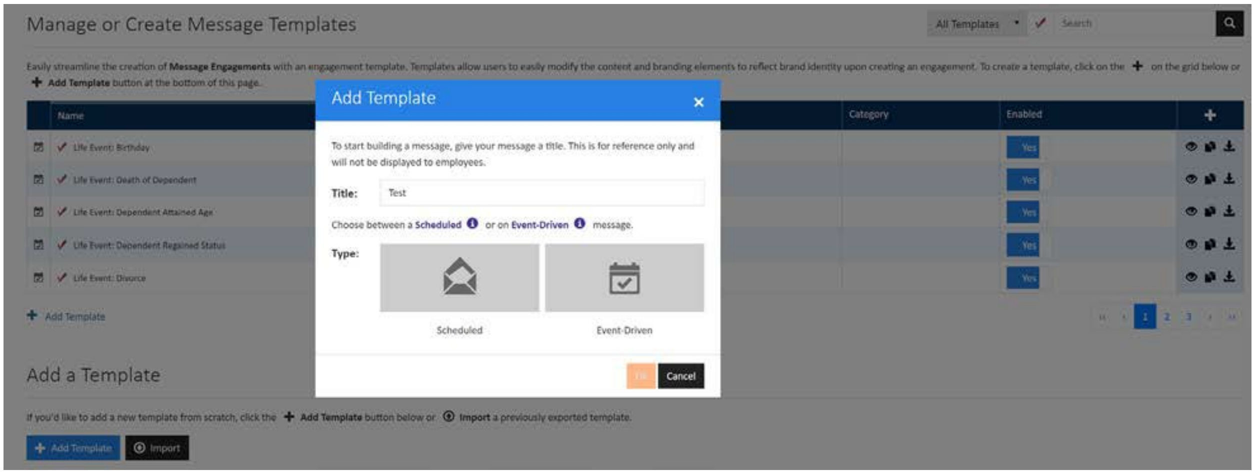
You will see the title entered in step one. You can also select a category (optional) and enter a description (optional).

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.

Step 8 – Creating the Email version of your message template

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

Enter content directly into the email 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 content page.

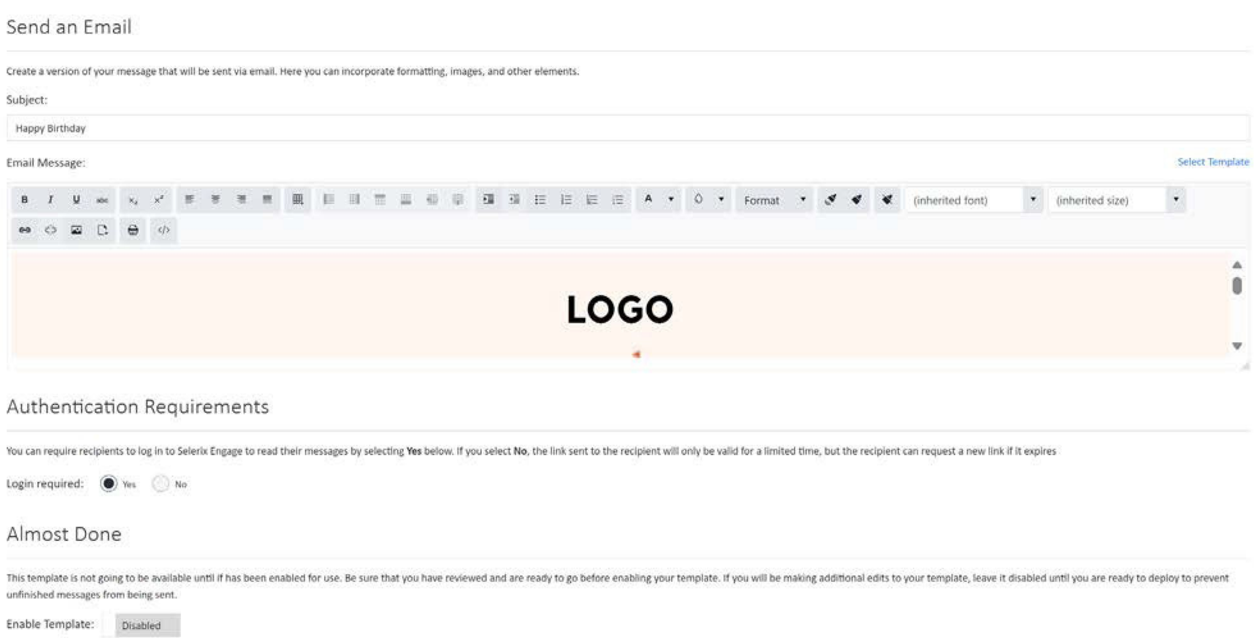
Click on the Select a Template link. You can then select a saved template from the Templates section on the left (see the Creating a Template section).

Step 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 message template if it is ready for use or save it as disabled if it is not ready for use.



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.

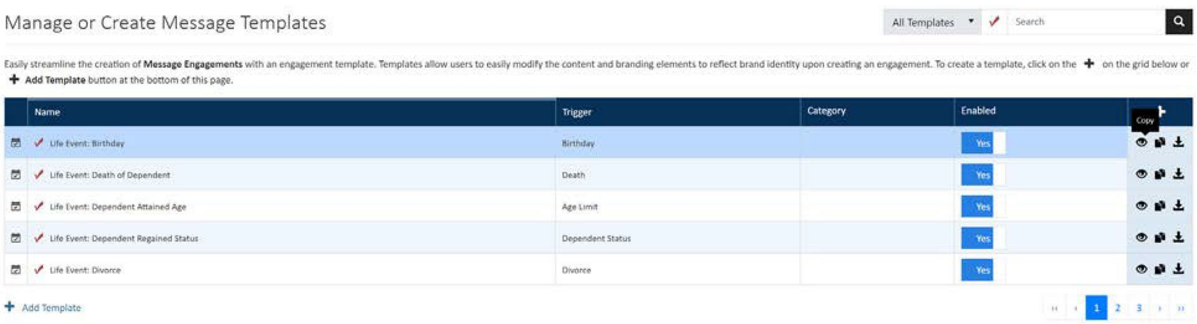
Step 1

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.



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

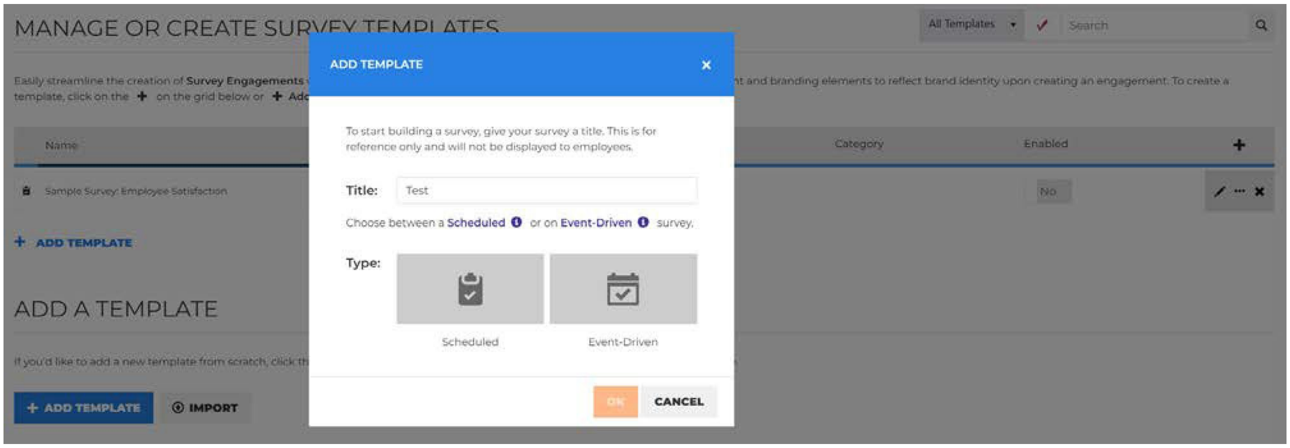
Give the survey template a title and indicate if it is scheduled or event driven.

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

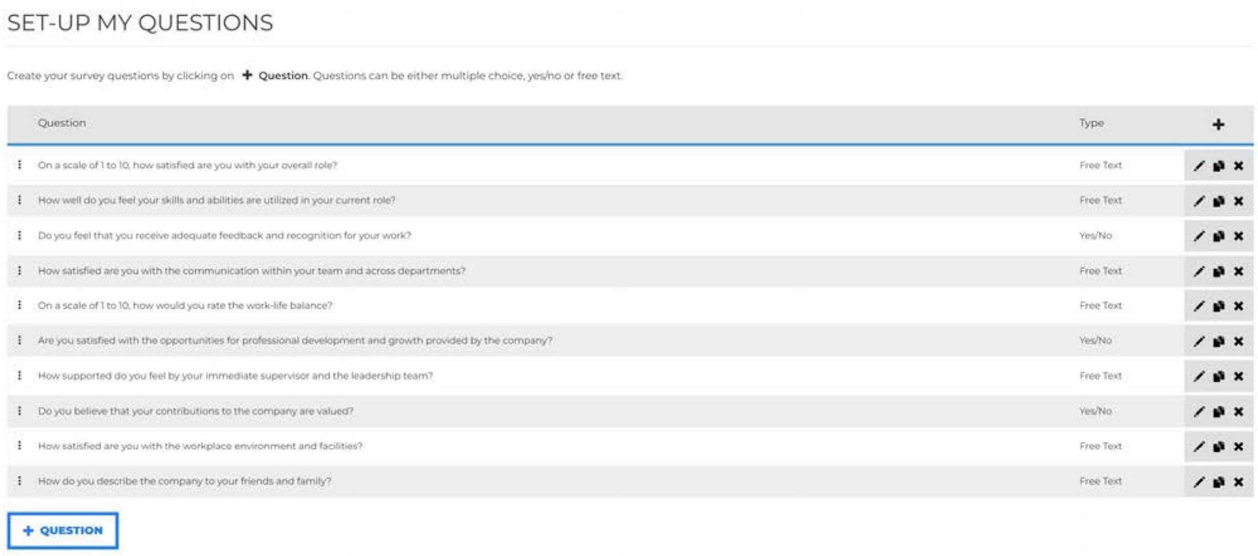
You can choose to lock the template which restricts who can modify it. To restrict the template, select Yes and add users who can manage it and make changes. Selecting No will allow any user to make changes.



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 **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 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.

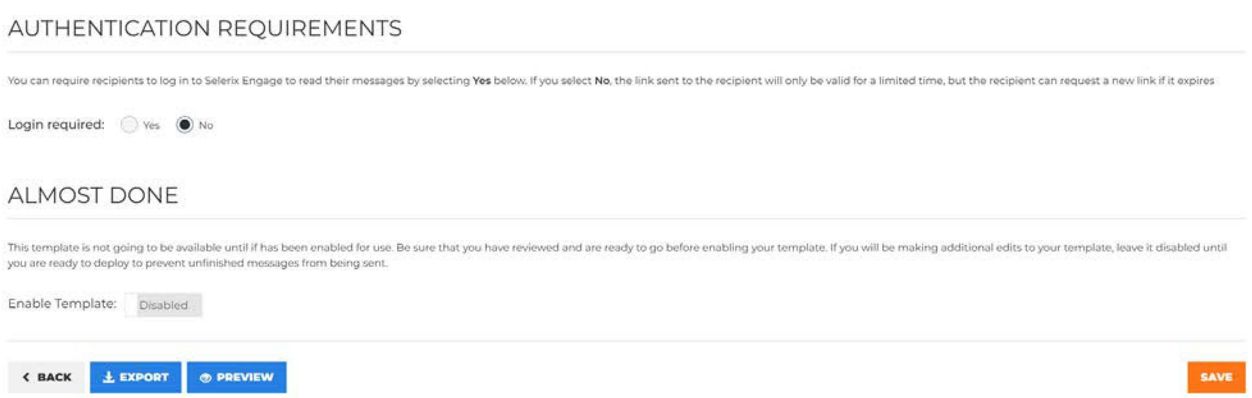
Click on the Select a Template link. You can then select a saved template from the Templates section on the left (see the Creating a Template section).

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.



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

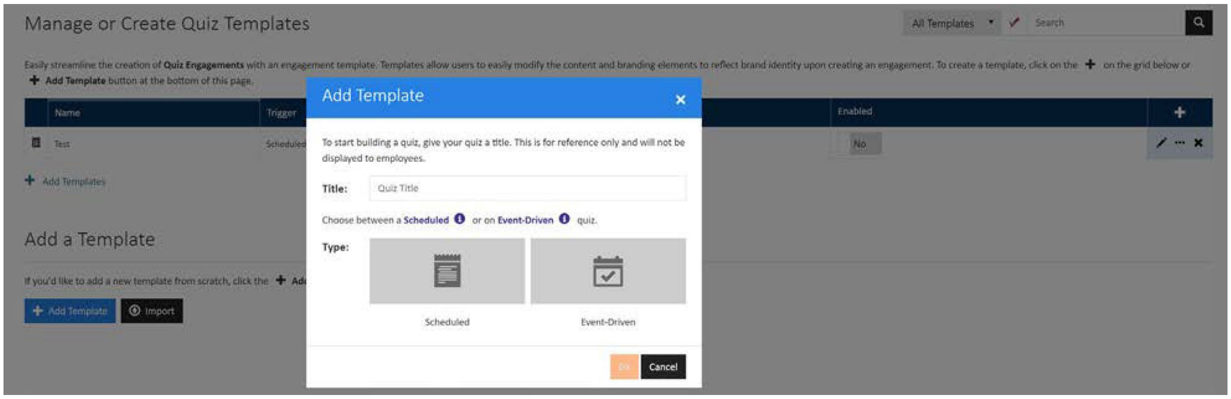
You will see the title entered in step one. You can also select a category (optional) and enter a description (optional).

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.

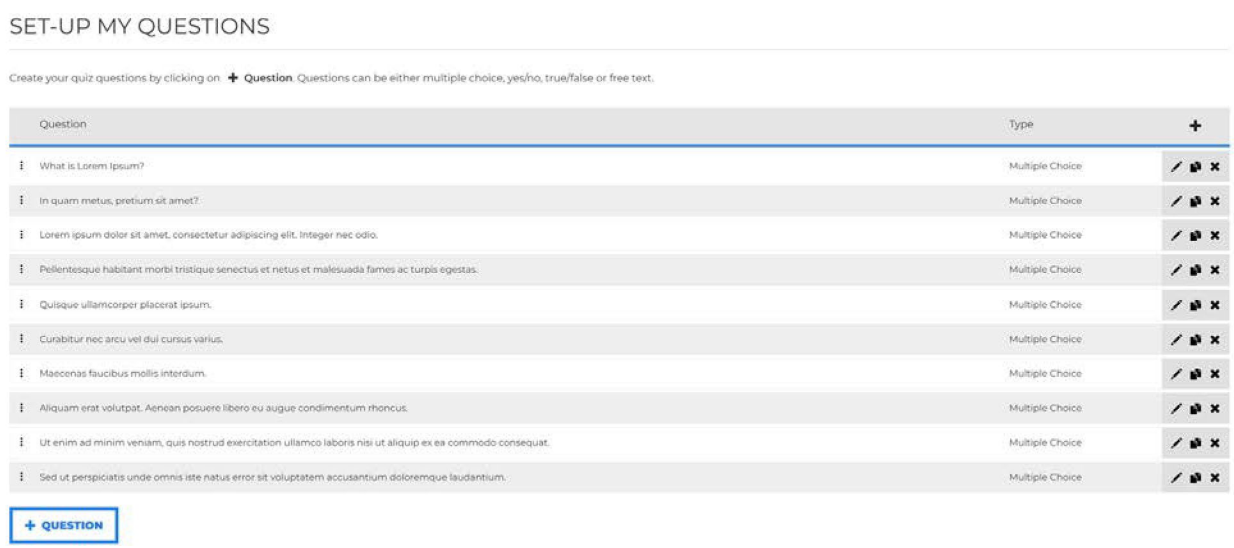
Step 4 – Question Feedback

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 **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 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.

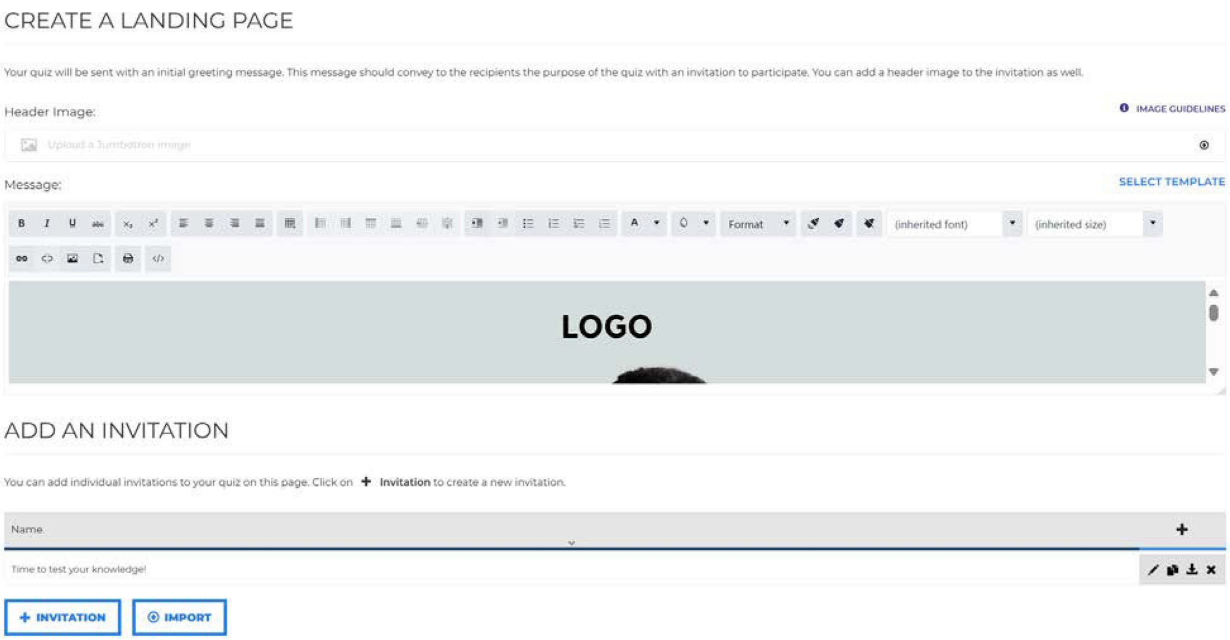
Step 7 – Creating the quiz invitation

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
Message:
SELECT TEMPLATE
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.

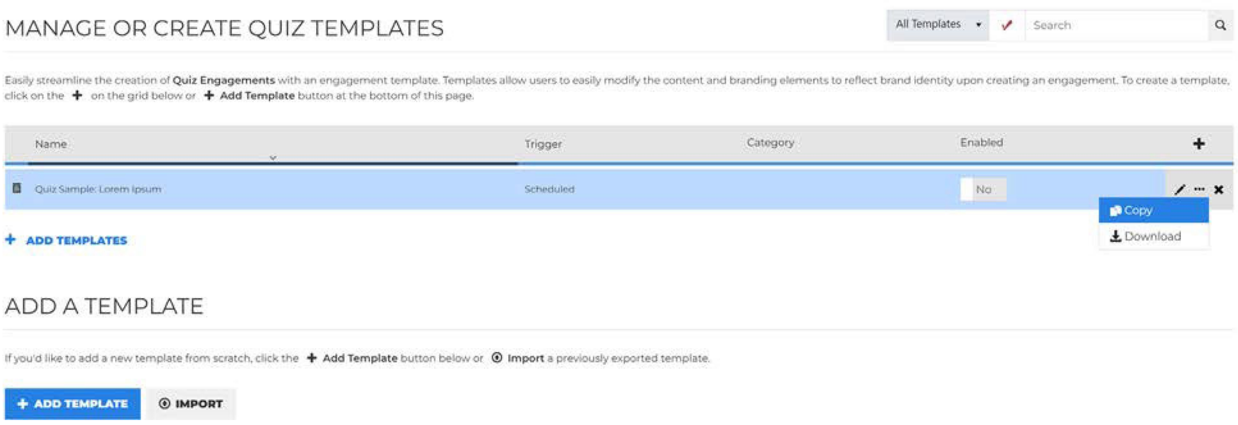
Step 10 – Almost Done

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.



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.

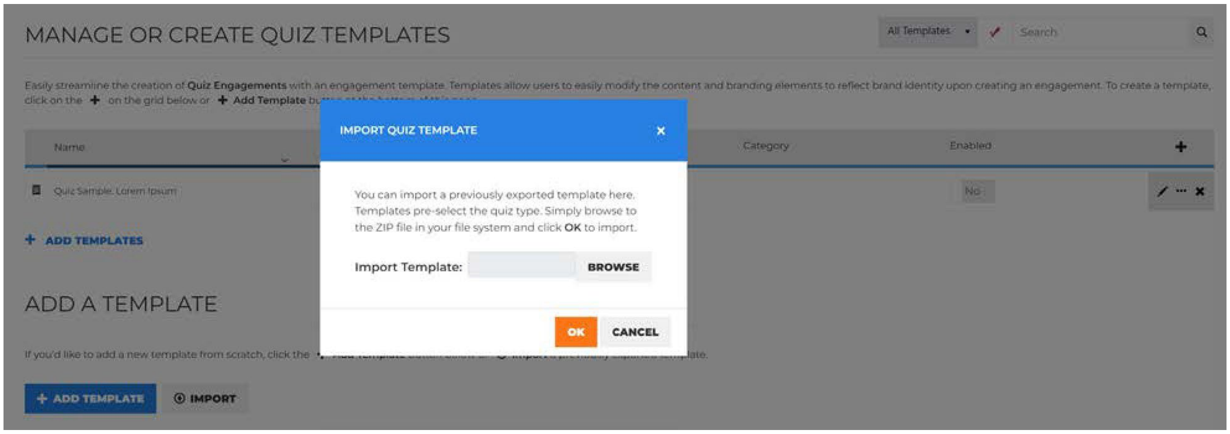
Step 1

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: Using Assets in Engagements

Assets house any documents and images that can be attached through emails and content pages. Assets are divided into two sections, *Forms* and *Files.*

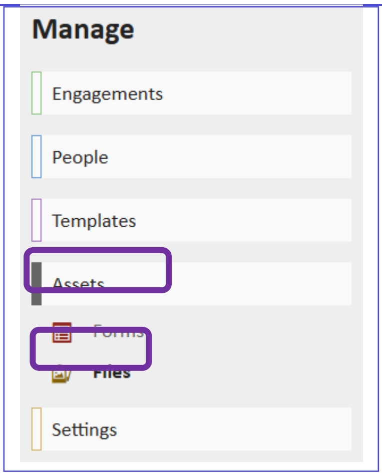
- Forms: Any documents that are housed in the form library on BenSelect will appear here. This section cannot be modified from within Engage, but only in the form library.
- Files: Any documents outside of the form library to be incorporated within engagements will need to be uploaded here. Please note that the file size limit is 1Mb. For rule of thumb, any document 1-2

Insert Images from Assets

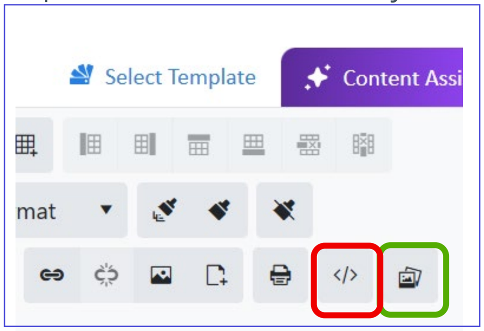
DISCLAIMER: Images should never be copied and pasted in any content.

1. Before inserting an image into your content, upload it to the system.
    - Go to **Files** under **Assets** on the right-hand side of the Dashboard.
    - Click **Add File** to select and upload the image.

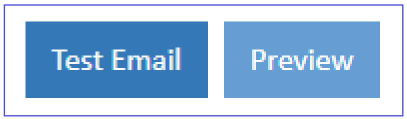
    - Supported formats: **JPG, JPEG, GIF, PNG**
        - (Max size: 1 MB)



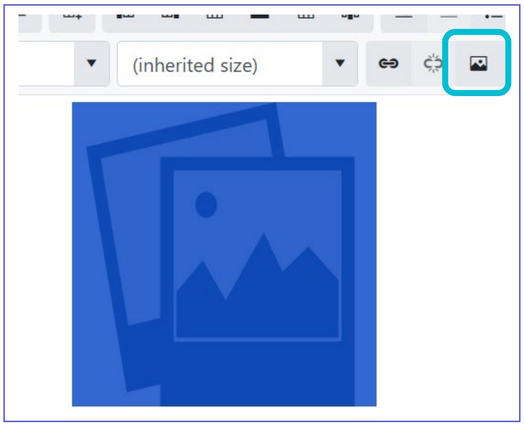
2. Insert the image using the **Files Icon**.
    - Select the image you uploaded and insert it into your communication.

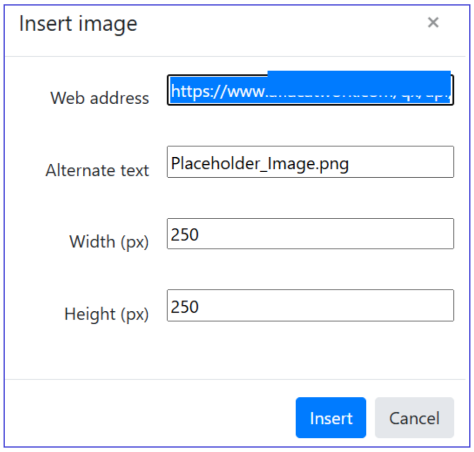


3. Preview your email (Optional).
    - Use the Test Email and Preview tool to check how your email will appear to recipients before sending.

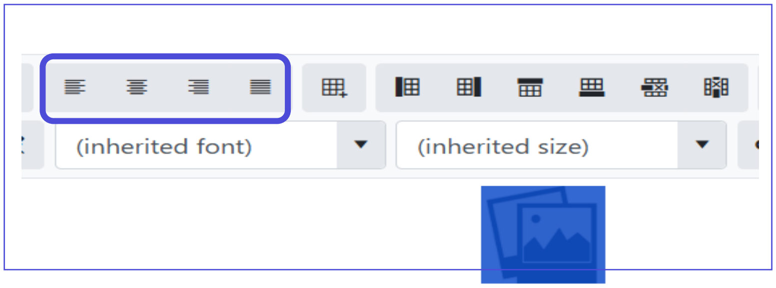


4. Resize your image (if needed).
   - Click the image to highlight it.
   - Select the **Insert Image Icon**.
   - Adjust the width and height as needed.

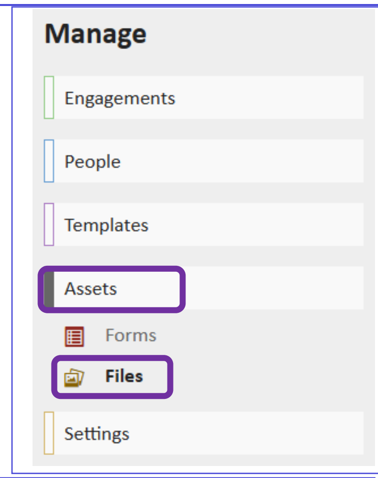




5. Adjust image alignment.
   - Click the image to highlight it.
   - Use the **Alignment Icons** to position the image (left, center, or right).



Attach Documents from Assets



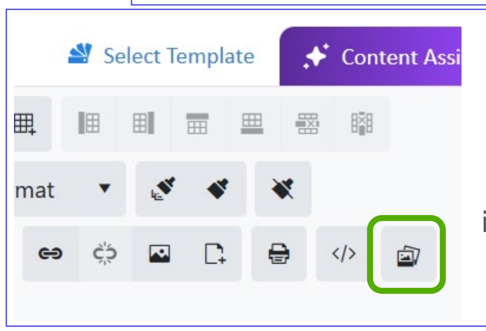
If you have a small document that's not hosted in the form library, you can add it using the **Files Icon**.

1. Before attaching a document into your content, upload it to the system.
   - Go to **Files** under **Assets** on the right-hand side of the Dashboard.
   - Click **Add File** to select and upload the file.

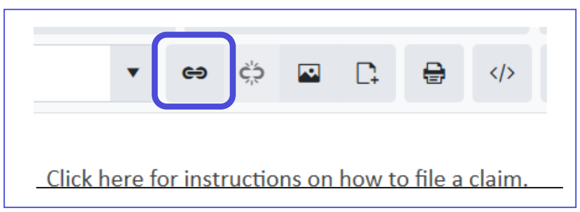
     

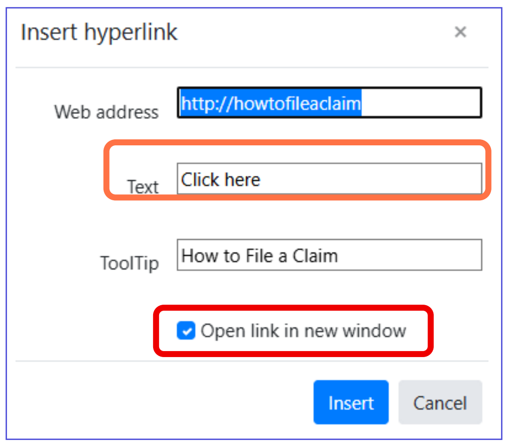
   - Supported formats: **DOC, DOCX, PDF, TXT**
     - (Max size: 1 MB)

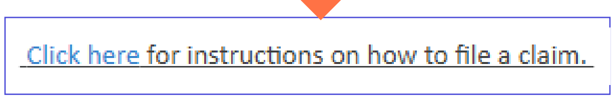
2. Attach the document using the **Files Icon.**
   - Return to your communication.
   - Place your cursor where you want your document file to be placed.
   - Click the **Files Icon.**
   - Select the document you uploaded and insert it into your content.



3. Edit the document link (if needed).
   - The document will be inserted as a hyperlink.
   - You can edit the link by clicking the document file and selecting the **Insert Hyperlink Icon** to edit.







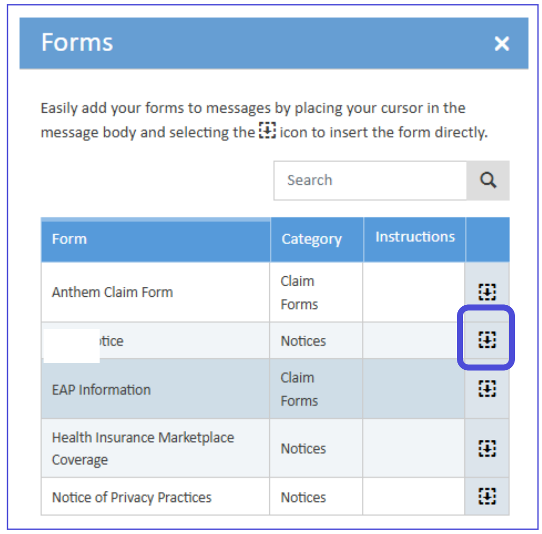
4. Customize the display link **Text**
5. Check the option to **Open the link in a new window**

Insert Form Links from the Form Library

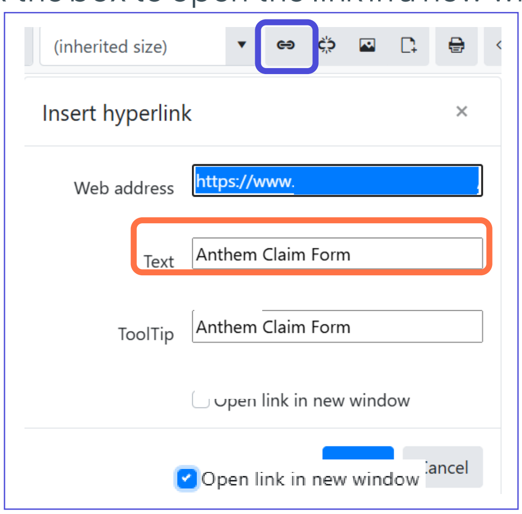
Most common uses are

- Benefit guides
- Evidence of Insurability (EOI)
- Claim Information

1. Click the **Forms Icon** and search for the form you're wanting to add. Click the **Select Form Icon** to add it onto the page.



2. You can use the **Insert Hyperlink Icon** to change the **Text** that appears on the content and check the box to open the link in a new window.



Chapter 7: Managing Content Settings

Creating Global Audiences

You can create global audiences 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.

Building 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.

Note: Global audiences can only be edited under Audiences in the People section. Non-global audiences can be edited within the engagement in which they were created

Managing Employee Data

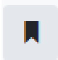
The Employees section gives you access to all employees in the case along with their contact information. This gives you the ability to manage individual employee data without the need to leave Selerix Engage and log in to the benefits administration platform.

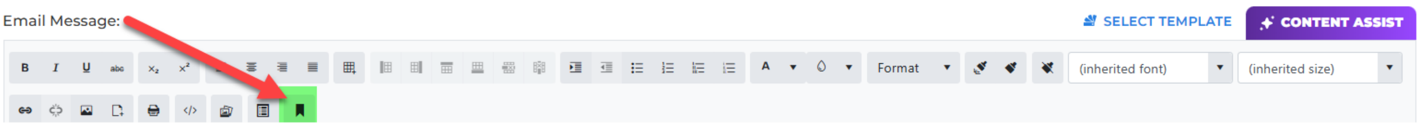
Manage Employee Data

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 tabled 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.

You can add placeholdes using the  icon in the Email Messages Text Editor.



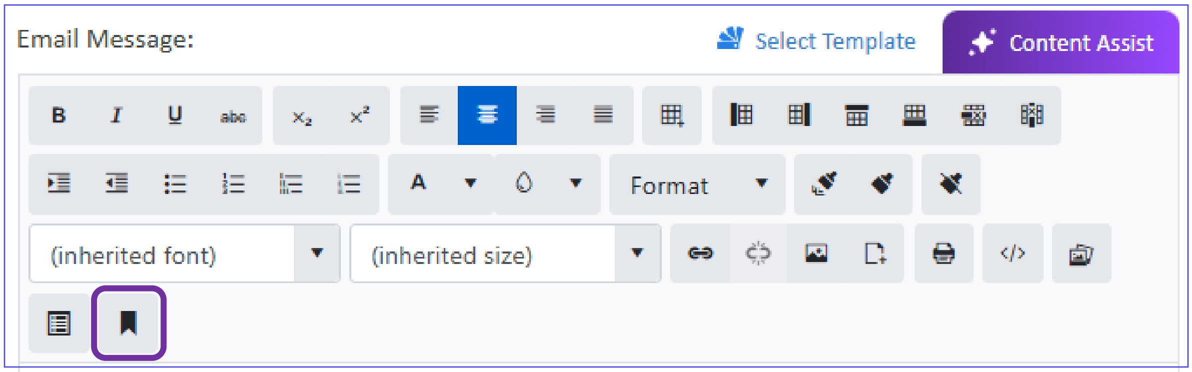
1. Employee ID - [EMPLOYEE_ID]
2. Employee User ID - [EMPLOYEE_USER_ID]
3. Employee Prefix - [EMPLOYEE_PREFIX]
4. Employee Nickname [EMPLOYEE_PREFERRED_NAME]
5. Employee First Name – [EMPLOYEE_FIRST_NAME]
6. Employee Middle Name - [EMPLOYEE_MIDDLE_INITIAL]
7. Employee Last Name - [EMPLOYEE_LAST_NAME]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

25. Employee Work Email - [EMPLOYEE_WORK_EMAIL] 26. Employee Personal Email - [EMPLOYEE_PERSONAL_EMAIL] 27. Employee Department - [EMPLOYEE_DEPARTMENT]	

How to Add a Placeholder

Placeholders are values that can be inserted into text messages and emails to automatically pull in information.

1. Place your cursor in the message where you want the placeholder to appear.
2. Click the Placeholders Icon



3. Click the Select Form Icon to insert the placeholder.

Placeholder	Description	Category	
[EMPLOYEE_FIRST_NAME]	Employee First Name	Employee	
[CASE_NAME]	Case Name	Case	
[CASE_PROPERTY_{case_prop_label}]	Case Property	Case	
[DATE_NOW]	Current Date	Employee	
[EMPLOYEE_CUSTOM_FIELD_{custom_field_label}]	Employee and Person scope custom fields	Employee	

- [EMPLOYEE_FIRST_NAME] is a common placeholder used to personalize messages with the employee's first name.

- ***Note:*** If the required employee data is missing, the placeholder text will display instead of the actual value.

Chapter 8: 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.

DMARC – 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.

DKIM – 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.

To insert the 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.