

precisely

EngageOne

Compose/Communicate Integrated Features

Version Compose 4.4.11 onwards



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1 - Introduction

This guide describes EngageOne Compose and Communicate integrated features.

Refer to the configuration documentation available on the [EngageOne Compose](#) support page for details on how to integrate your EngageOne products to use the integrated features.

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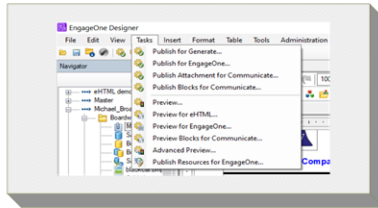
Compose/Communicate integration features

- EngageOne Designer
 - Mark blocks and publish content from your existing templates to EngageOne Communicate.
 - Publish templates to EngageOne Communicate as an attachment to a communication in EngageOne Communicate.
- EngageOne Communicate
 - Design your communication using blocks of content originating from Designer.
 - Attach templates from Designer to your email communication.
- EngageOne Server
 - Import and manage templates from EngageOne Communicate for email delivery.
 - Generate responsive HTML communications typically using EngageOne Server's high-speed batch capabilities.
- EngageOne Deliver
 - Deliver responsive HTML emails provided by EngageOne Server above.

Mobile Delivery

Mobile Delivery Workflow

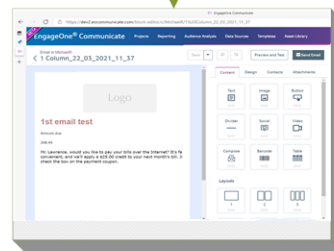
EngageOne Designer



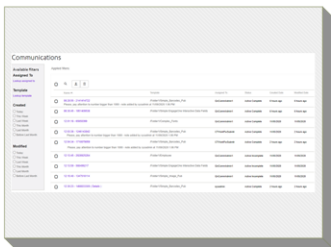
Designer publish option:
Publish Blocks for Communicate
Designer preview option:
Preview Blocks for Communicate

Communicate Account

EngageOne Communicate



EngageOne Server/Admin



Import Communicate template
via EngageOne Server/Admin

Submit for delivery

EngageOne
Deliver

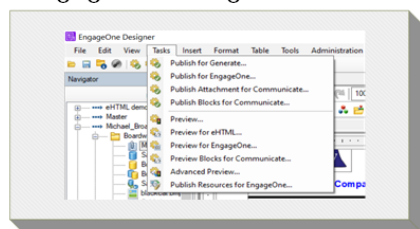
Responsive emails
delivered to their recipients



Dynamic attachments

Dynamic Attachments Workflow

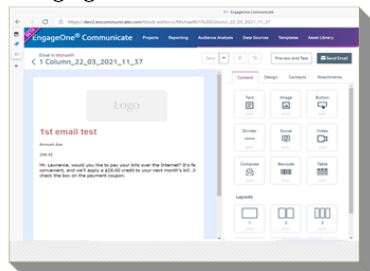
EngageOne Designer



Designer publish option:
Publish Attachments for Communicate

Communicate Account

EngageOne Communicate



Create responsive email
communication including Attachments
originating from Designer



2 - EngageOne Designer

From Designer, you can:

- Publish documents to your EngageOne Communicate account. You can include these documents as email attachments to communications within EngageOne Communicate.
- Share blocks of content with EngageOne Communicate to create responsive communications.

To make use of the features described above:

- You must have an EngageOne Communicate account in place. Contact your support team for details on account registration.

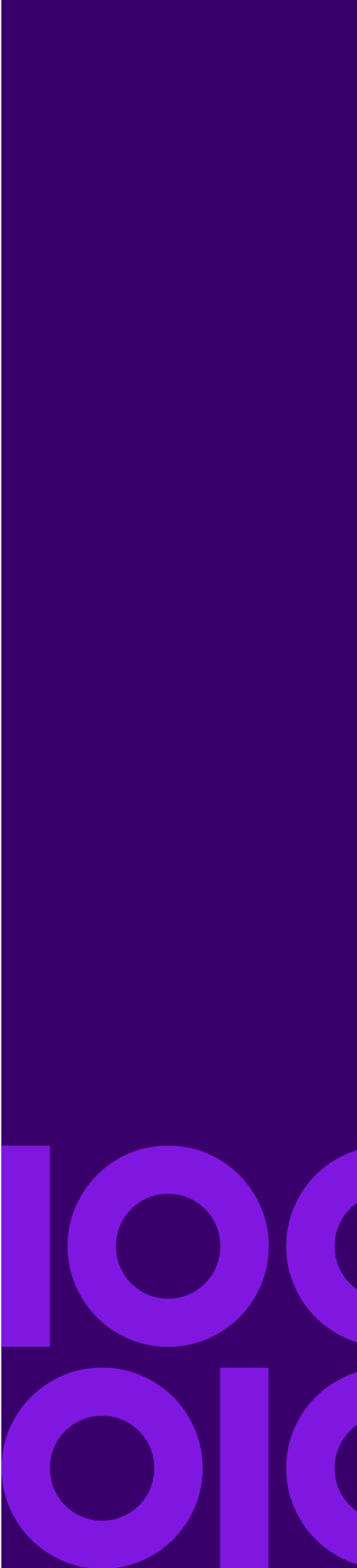
Note: Refer to the configuration documentation available on the [EngageOne Compose](#) support page for details on how to integrate your EngageOne products to use the integrated features.

Publishing templates to Communicate - advance notice

The **Publish for Compose cloud** feature will be deprecated for EngageOne Designer SP9 and SP10 in 2022. To continue publishing templates for EngageOne Communicate, you will need to upgrade to the Service Pack 11 or later versions of the software.

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Publishing blocks for Communicate

Working with tagged content

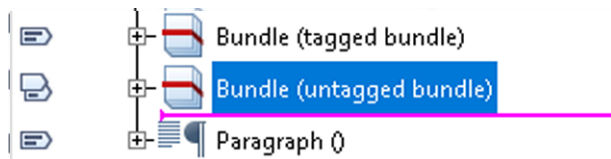
You can share paragraph content associated with specific design objects in your publication with EngageOne Communicate using the **Tag Block for Communicate** logic map option. Use the **Preview Blocks for Communicate** option to preview the tagged content. When finalized, use the **Publish Blocks for Communicate** to push the shared content to your Communicate account for use in EngageOne Communicate.

Tagging for content is supported for the following design object types:




- Paragraphs
- Bundles
- Conditions
- Case structures
- Active content references
- Active content
- Text Boxes
- Table cells
- Sections

Note: only paragraph content is shared not the design object itself.

Tagging is performed from your publication's logic map; refer to [Tagging content](#) on page 9 for detailed information. Icons identify content that has already been tagged in the logic map.



Where:

-  - collapsed tagged item with tagged child items
-  - collapsed untagged item with tagged child items
-  - tagged item

Tagging content

Note that duplicate names for tagged blocks in the same publication, public document or active content are not allowed.

To tag publication content :

1. In the publication's logic map, hover over and right-click the design object to tag.
2. From the context menu, click the **Tag Block for Communicate** option.
3. From the **Tag Block for Communicate**, assign a name for the tagged block.

A list of existing tag blocks is displayed in a grid format.

Note: Where a tagged block has previously been defined, the **Tag Block for Communicate** option is replaced with **Edit Communicate Block Tag** and **Remove Tag** options.

Previewing tagged content

To preview tagged content:

1. In the navigator browse to and select the publication containing tagged blocks to be published.

Note: you can also perform the step that follows from within the publication.

2. From the **Tasks** menu select **Preview Blocks for Communicate**.

HTML preview files are created based on the sample data assigned to your publication.

Publishing tagged content

Before you publish tagged content you must have created a connection to EngageOne Communicate; refer to [Connecting to your EngageOne Communicate account](#).

To publish tagged content :

1. In the navigator browse to and select the publication containing tagged blocks to be published. Note that you can also perform the steps that follow within the publication.
2. From the **Tasks** menu select **Publish Blocks for Communicate**. Enter your sign-in credentials to access your EngageOne Communicate account.
3. The content tagged in the Designer editor will be available for inclusion in EngageOne Communicate.

Publishing attachments for Communicate

Dynamic attachments

When publishing attachments to EngageOne Communicate, you will need to:

- have previously created a connection to EngageOne Communicate.
- be aware of non-supported design objects for this feature; these are:
 - External keyed images
 - Lookup tables
 - Custom plug-in chart implementations
 - Journals
 - Message areas & streams
 - Fields with the attribute **External RTF filename**.
- be aware that publication name is used as the attachment name in EngageOne Communicate.

Publishing attachments for EngageOne Communicate

Before you publish attachments you must have created a connection to EngageOne Communicate; refer to [Connecting to your EngageOne Communicate account](#).

To publish attachments:

1. In the navigator, browse to and select the publication to be published.
From the **Tasks** menu, select **Publish Attachment for Communicate**.
2. Specify Publish Preferences.
 - If you have multiple connections for your Communicate account, you are required to select the company you wish to work with.
 - If you have multiple PDF output devices configured in the project, you must select the required output device.
Note: Where there is only one connection and a single PDF output device is configured, this step will be skipped.
3. Confirmation - click the confirmation checkbox.
If you are satisfied with the details presented; this will in turn enable the **Publish** button.

4. Click **Publish**.

This will publish a template package created from a single publication in a single ZIP file to the Communicate account.

3 - EngageOne Communicate

Once you have integrated your Designer and Communicate accounts (see the *Compose/Communicate Configuration Guide*) you can:

- publish blocks of content in Designer which can then be used in emails created Communicate for Mobile Delivery.

Note: For Mobile Delivery you require an integrated EngageOne Designer/Communicate/Server/Deliver operating environment.

- publish templates in Designer which can then be imported into Communicate and used as Dynamic Attachments to emails created by Communicate.

Note: For Dynamic Attachments you require an integrated EngageOne Designer/Communicate operating environment.

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Working with content from Compose

Importing a Data Source

Mobile Delivery

To import a Data Source from Compose, select **Data Sources** and then **Add Data Source**. When prompted for the Data Source type, click on **Compose** and select the appropriate template from the dropdown menu. For more information, see the Communicate help.

Dynamic Attachments

To import a Data Source to be used with Dynamic Attachments, select **Data Sources** and then **Add Data Source**. When prompted for the Data Source type, click on **Upload File**. Either browse for the required data file or use the drag and drop feature. Note that CSV, XML and JSON are the only valid data types for use with Dynamic Attachments.

Creating an Email based on a Compose Template

To create a new email in Communicate that is based on a Compose template, create a Project (or open an existing one) and select **Create New**. Then click the **Create New Email** button.

The email block editor is displayed and shows an additional type of block: the **Compose** Block. This block allows you to use any template that has been published from Designer. Note that the **Compose** Block is only displayed if EngageOne Compose datasource functionality has been enabled, contact your support representative for further information.

When you drag a Compose block into your email, select a template from the dropdown, which lists all the Compose templates that have been published from Compose (if the currently selected contact list is based on a template, that template is preselected in the list).

If the template you select is different from the Data Source selected for the email, an error message will be displayed ("The template does not match the data schema"). You need to go to the Contacts tab and select the same template from the drop-down.

The various elements of the template, that are available for the Data Source selected, are now displayed. If you click **Select**, that element is added to the email. You can also click on the eye icon at the top right in order to see a preview of the block.

If there are any font families used in the Compose template element that are not supported in Communicate emails, a message is displayed ("Your font family is not email compatible. Please select a replacement") and you are prompted to select a replacement font family. See the Communicate help for a list of font families that are supported in Communicate emails.

When you have inserted the Compose element that you want, you can change the Design Style, including the font. Click **Change** to use a different element from the Compose block.

Note: The Data Source for the email (accessed via the **Contacts** tab) must match the Data Source associated with the Compose template that you are using.

Once the email has been created in Communicate, you can send it as part of a Campaign, see [Dynamic attachments](#) on page 6. Alternatively, you can download the email template, which can then be picked up by EngageOne Server as part of the process for [Mobile Delivery](#) on page 5.

Audit information for Compose blocks and attachments

Audit information is included with Compose Blocks and Attachments. You can use this information for tracking the template in EngageOne Designer using the version history feature. Refer to the Version history section in the Designer User's Guide for details.

To view audit information in Communicate, use the Preview option visible when you hover over the Compose Block/Attachment **Select** button.

Tag Path and tag source for blocks in Active Content and Public Documents

If there are tagged blocks inside active content/public document objects, then the preview for blocks shows the tag path and whether the block originates from an active content or public document object. This information is presented in brackets next to tag name.

Additional information

The Communicate help has full details of how to add Data Sources and create emails.

4 - EngageOne Server

Use EngageOne Admin to:

- import Communicate templates refer to **Importing templates from Communicate** on page 16 for further information.
- create a Delivery Channel with the appropriate mobile delivery settings using the **Delivery Management/Delivery Channels** option. For detailed information, refer to the Delivery Channels and Delivery options sections in EngageOne Administration Guide.
- generate responsive communications from imported Communicate templates using EngageOne Server's high-speed batch processing capabilities. Note that the supported batch processing options are Non-accumulated batch, Accumulated batch and Immediate delivery. For detailed information on using Server's batch features, refer to the **Batch processing** section in EngageOne Administration Guide.

Note: EngageOne Server is used for the Mobile Delivery only, and is not required for the Dynamic Attachments feature.

Note: Refer to the configuration documentation available on the **EngageOne Compose** support page for details on how to integrate your EngageOne products to use the integrated features.

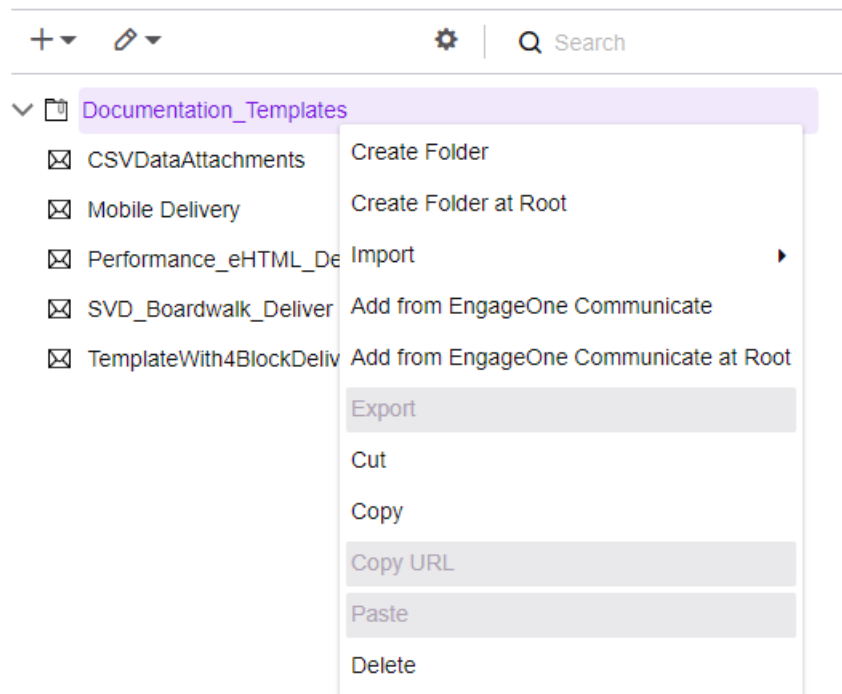
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Importing templates from Communicate

A context menu is available when are working with resources in the tree-view area of the EngageOne Server Admin workspace. Click the right mouse button to activate the context menu.



Use either the **Add from EngageOne Communicate** or **EngageOne Communicate at Root** option depending on where the template is to be imported in your folder structure.

The **Add from EngageOne Communicate** page is presented:

Add from EngageOne Communicate

Destination: \

Company
QA Test Account

Team
Compose-Testing

Project
EndToEndPDFDeviceSettings

☐ Show previously added templates

Q Search

☐

Template Name

☐

EndToEndPDFDevice2

☐

Channel

Email

☐

Last Updated

02/06/2021 09:12

☐

Created By

Kiran Deglurkar

☐

EndToEndPDFDeviceSettings1

Email

☐

27/05/2021 16:54

Kiran Deglurkar

10

AddClose

Note that the **Company** and **Team** fields are pre-populated based on the Communicate account you are connected to. Select the required Communicate **Project** from the drop-down.

Considerations and settings

When processing EngageOne Communicate templates in a mobile delivery setting, you need to be aware of the following:

- Your operating environment must be integrated with EngageOne Deliver.
- Mobile delivery is valid for non-interactive templates only.
- The EngageOne Interactive Editor (ActiveX and Application) cannot be used with templates intended for mobile delivery.

To use the mobile delivery, configure a **Delivery Channel** with the appropriate settings described below.

Delivery Channel settings:

- Compatibility Mode: **Default Batch** or **Default Immediate**
- Type: **EngageOne Deliver**

Outbound Profile settings

- Supported profiles for mobile delivery are: **NA-Batch**, **A-Batch**, and **Immediate**

Note: Immediate delivery and A-Batch processing is restricted to using SOAP calls only.

General settings

Complete the following mandatory fields:

- **From address**
- **To address**
- **Subject**

Output variables

From the **Delivery Management\Output Variables** tab, you can use output variables that allow variable information to be included in your general settings. For example, you will typically include the **MAIL_TO** output variable into the **To address** setting to use the email address provided in the data.

You can choose an output variable to use from:

- a set of predefined items, for example, **SYSTEM_DATE**, **DOCUMENT_PAGE_NUMBER**, etc.

- data items associated with your template's Designer data format
- data items defined in Communicate from the data source associated with the communication

Email Body

- Select **Template contains Email Body**

5 - EngageOne Deliver

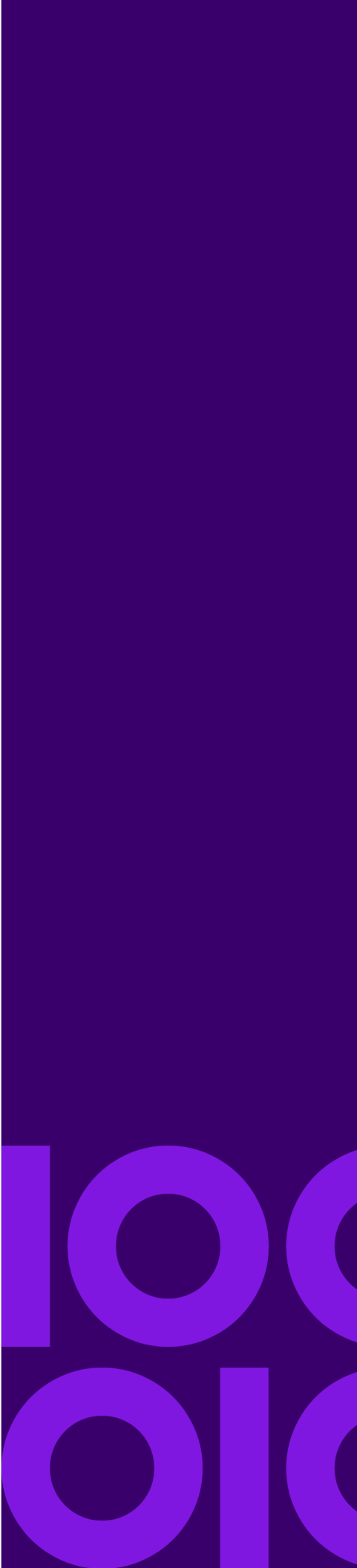
This chapter describes the steps you need to follow to send responsive HTML email content generated in EngageOne Server using the features offered by your integrated EngageOne Deliver environment.

Note: EngageOne Deliver is used for the Mobile Delivery only, and is not required for the Dynamic Attachments feature.

Note: Refer to the configuration documentation available on the [EngageOne Compose](#) support page for details on how to integrate your EngageOne products to use the integrated features.

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Sending emails generated in EngageOne Server

To send emails generated by EngageOne Server: from a command prompt window of your Deliver installation's `...\deployments\command` folder.

Type the following command:

```
e-Messaging.bat <Name of the outbound profile>
```

Refer to the Outbound Profiles section of the [EngageOne Deliver Users Guide](#) for detailed information.

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