Steps	Click Track	Talk Track	Value Highlights	Comments
PREPARATION 1: Rules	Navigate to Admin panel (gear icon) and: 1. Configure contact categories in the Contact Categories subtab, by linking a contact DE with a field "category", which contains some sort of grouping 2. Configure campaign types in the Campaign Types subtab, by typing "newsletter", "promotion", "birthday", "new product" in the campaign type text field. After adding, click on the campaign type to assign a default campaign priority. 3. Configure a custom channel (e.g. Whatsapp) in the Channels subtab, by creating a custom channel and linking an existing DE to complete 4. Create 1-2 rules, in the Rules subtab, e.g. 2 Emails per 7 days. 5. Adapt the "run time" in the Settings sub tab, to ensure the coloring of the campaigns are done before the start of your demo			1. Prepare a DE with a field "contact category" that conains some sort of grouping (example for Pharma "HCP" and "Patients") 2. and 4. Ask which campaign types they typically use, and which rules they would like to define (during the Discovery meeting)
PREPARATION 2: Campaigns	Create a few Sends on the calendar (use 'Import Journeys' if you already have available campaigns in your SFMC). Tips: 1. Use the same DE(s) as your audience, for your campaigns. 2. Spread the campaigns over the month, to have higher chances of having green/orange/red campaigns visible			
PREPARATION 3: Campaign data	Activate 1 or more journeys with saturation control, in order to see campaign data in the "Dashboard" tab of DESelect Engage.			
Introduction		DESelect Engage is an ISV solution for Salesforce Marketing Cloud. It helps marketing teams solve saturation control, intelligently prioritize communications & optimize campaigns across teams.	How does DESelect Engage differ from Einstein Engagement Frequency? 1. DESelect Engage allows users to configure custom rules for optimal engagement frequency. With Einstein, users do not exactly know why Einstein includes/excludes contacts from campaign. Users have no control over how Einstein makes this decision. 2. DESelect Engage applies to all SFMC's OOTB channels (SMS; Email, Push) and can also apply to any custom channel. Einstein Engagement Frequency only applies to Email and Push. 3. Einstein requires 90 days of data before it can actively exclude oversaturated contacts from campaigns, whereas DESelect Engage works as soon as you configure your first rule. 4. Einstein requires companies to use the standard preference center, whereas DESelect Engage does not.	
Open App	1. Click on App Launcher 2. Open DESelect Engage	Today, I will show you how DESelect helps optimize their Engagement Frequency in Marketing Cloud, by using campaign priorities and custom engagement frequency rules. We will see how marketers can: (1) create custom rules (2) plan and prioritize campaigns on a calendar (3) automatically exclude oversaturated contacts from campaigns. We can see that we access DESelect directly in Marketing Cloud so Marketeers don't need to switch solutions and can segment on the same platform they execute their campaigns.		

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Home Screen walkthrough	Hover over: 1. Subtabs (Calendar View, List View, Dashboard) 2. 2 buttons: Import Journey, Create Send 3. Settings wheel (to Admin Panel) 4. Support (?)	1. At the top, you see (Left to Right): The subtabs of the home screen, where campaign managers will spend most of their time in Engage. Users can access a calendar view, or a list view in case they also want to have the overview of the unplanned (triggered) sends. Furthermore, users have a Dashboard where they can analyze saturation control on campaign level and on contact level. Users can also Create reports per channel, campaign type, or contact category. 2. On the right, you can import existing active journeys, or plan new campaigns. 3. On the bottom right, you can navigate to Engage's Admin Panel (our "settings" tab) or contact Support.		In Engage, we typically talk about "campaigns", as it is easy to understand. However, DESelect Engage actually works on the Send/Message level. Example: you might have an active Welcome campaign, which entails 3 emails to be sent in a certain sequence. Once you import this Welcome campaign, DESelect Engage will ask you which of the 3 *sends* (emails) to import, from this journey. Each email will then show as a single *send* on the calendar.
Campaign Calendar Legend	1. Hover over "Legend" 2. Move a red campaign to another date 3. Click on "recalculate"	1. As you hover over the Legend, you can see what the colors of these sends indicate; it shows you in advance - before anything has happened in Journey Builder - how many of your targeted contacts exceeds your custom frequency limits - your rules - and is therefore considered 'oversatured' or 'fatigued' (and thus at risk of unsubscribing). 2. On the campaign calendar, drag and drop an existing campaign (e.g. a red one) to another day. 3. A request to "recalculate" will be prompted at the top. By clicking on "recalculate", the system will review all planned campaigns and color them according to their saturation levels. But where and how do we configure these 'rules' or 'limits' that DESelect Engage is using to predict the saturation levels for campaigns?		
Admin Panel	Click on the gear icon (bottom right) to navigate to the Admin Panel	DESelect's Admin Panel is like Salesforce's Settings Tab. From Top to bottom, admins can manage users, set up saturation rules (frequency limits), and configure different campaign types, communication channels, and contact categories that can be used in the Rules. Furthermore, admins can control visibility to DEs, set up priority levels, campaign tags, and general settings.	Rules for optimal engagement frequency can be defined across all contacts, all campaign types, and all channels, or can be made very specific and only apply to: certain contact categories, campaign types, and/or channels. This gives admins lots of flexibility in developing optimal rules for engagement frequency, tailored to your organization or use case.	
Rules	Click on the Rules subtab and open one of your existing rules	Rules for optimal engagement, or saturation limits, are at the heart of DESelect Engage. Users create their own engagement rules, that DESelect Engage will apply to future (and existing campaigns). Create rules that apply to all contacts, all campaign types, all channels, or rules that only apply to specific contact categories, specific campaign types, and/or specific channels	The flexibility of creating custom rules for engagement frequency, is a major benefit for SFMC users that are looking for a solution that offers more flexibility than Einstein Engagement Frequency.	There are options to still create campaigns where saturation control (engagement rules) do not apply. By simply turning off saturation control for a certain campaign or send.
Contact Categories	Click on the Contact Categories subtab	To configure contact categories, simply link a master DE which contains all contacts and their categorization.		Try to come up with a few relevant examples of what contact categories your prospect could configure

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Campaign Types (Prioriities)	Click on the Campaign Types subtab, and add a new Campaign Type (to show how easy it is)	Users can define their own campaign types, using a simple text field. For each campaign type, users can assign a default priority.	Campaign priorities work as follows: Imagine a rule: 2 emails per week When a contact receives 1 email on Monday, that contact is only allowed to receive 1 additional email and will be excluded from the 3rd email that week. Now imagine there are 2 more sends planned for this week: 1 email on Thursday (low priority) and 1 email on Friday (high priority). In this case, DESelect Engage will exclude the contact from the Thursday email, and include the contact in the Friday email. This happens because the Friday send is a higher priority, and DESelect Engage allows users to prioritize campaigns. (obviously, if 2 campaigns have the same priority, our system looks at which campaign is planned first)	
Channels	Click on the Channels subtab Optional: click on "add channel"	By default, all out-of-the-box channels are enabled in Salesforce Marketing Cloud. If you want to add custom channels, simply click "add channel"	DESelect Engage works with any channel, including custom channels like Whatsapp, WeChat, KakaoTalk, Line, MMS, direct mail. The only requirement is a DE in SFMC that logs the previous sends	If you want to set up a custom channel, simply link a DE with 2 date fields, after clicking "add channel"
		Now that we have a better understanding of how rules are configured in DESelect, let's go back to the campaign calendar, and see how new campaigns are planned.		To add a priority to triggered sends, navigate to list view and open your imported, unscheduled journeys/sends.
Create Send on Calendar	Click on the "+" next to a date on the calendar, and follow the wizard: 1. Give your send a name 2. Select the channel 3. Select the campaign type, and expand the "priority rule applied" to show that users can change it manually 4. Click Next 5. Select a Data Extension (start typing, for quick search) 6. Select the Contact Key field 7. Click Next 8. Click Next 9. Click Save 10. On the top, click "recalculate"	Planning campaigns is optional - it's not a mandatory step DESelect users have to take. However, it gives you a look into the future and an indication of the reach and saturation of your campaign. This information allows users to optimize their campaign calendar according to how much % of contacts are over-engaged (according to your custom rules). So let's create a campaign together, and see how it impacts our color scheme. After recalculation: we see some campaigns are green, some are red. If we grab a red campaign, and drop it to a day in the following week, and it changes color (red to green) after recalculation, we have improved our initial campaign calendar with regards to engagement frequency. We can move campaigns around and recalculate, until the calendar looks as full as possible, while still remaining as green as possible. To understand how our system works once a campaign is activated, let's go to Journey Builder.	Highlight that campaign planning in DESelect is an optional but valuable step. Highlight that users can automatically apply saturation control (using their custom rules) in Journey Builder, but also in Email Studio or Automation Studio through an automatically created "Excdlued Members" Data Extension. Highlight that users can turn of saturation control, and choose to count/not count the message towards the contact's limits	
Campaign execution in JB	Open an existing or new journey, with a defined entry source (e.g. Data Extension). Scroll down and drag the "DESelect Engage" custom flow control on the canvas, right after the entry source.	In order to apply saturation control to a journey, we go to Journey Builder where marketers are already executing all their campaigns. Once the DESelect Engage custom action is added to the journey, contacts will automatically be checked for: - which / how many messages have they received in the past - which custom rules apply to them - which send / message are we planning to send now Based on this information, DESelect Engage automatically puts contacts on an "include" or "exclude" path. Add the message (email, sms, push notification, custom channel) to the canvas, on the "include" path.	When contacts are excluded, DESelect can add "automatic retries". This feature allows users to define a "reconsideration window" where excluded contacts can still be added to the "include "path if they drop below the custom rules within the defined window.	

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DESelect Engage configuration in JB	1. Click on DESelect Engage and select an existing campaign for the dropdown. 2. Now click on "create new send" Click Done	To configure DESelect Engage in JB: 1. Select a planned campaign if possible. This will render some key information from the planning. Users can still turn off saturation control, if they want. 2. If users did not plan a campaign, they can create a new Send from within the journey (the same fields as when planning a campaign)		
Dashboard	Navigate back to AppExchange < DESelect Engage Click on subtab Dashboard	On this dashboard tab, users can analyze how many contacts were included/excluded in past campaigns, analyze on contact level which campaigns they were included in/excluded from, and create reports per channel, contact category, or campaign type.		