

MARKETO
NEXT-GEN UX

***QUICK
GUIDE***

Next-Gen UX — Default Program

Mass Actions and Mass Expirations

The screenshot shows the 'LPprogram' interface with the 'ASSETS' tab selected. A table lists assets with columns for Asset Type, Name, Status, and Last Edited. A 'Filter by' dropdown is set to 'Asset Type'. A 'Select Action...' dropdown menu is open, showing options: Approve, Unapprove, Activate Trigger, Deactivate Trigger, Unschedule Batch, and Delete. A '2 of 4 Assets Selected' indicator is visible. Callout 1 points to the multi-select checkboxes, callout 2 points to the filter dropdown, and callout 3 points to the 'Select Action...' dropdown.

Asset Type	Name	Status	Last Edited
Email	L.Oclonext	Draft	None
Landing Page	LPdelete	Draft	None
Landing Page	LPdemo	Approved With Draft	N/A
Landing Page	LPtest2	Approved	N/A

Mass Actions

- 1 Multi select all your assets in a default program
- 2 Users are able to filter by a specific asset type or a condition
- 3 Now you can select multiple assets to approve, unapproved, activate, etc. all in one location. This feature is not only in default programs, but also in engagement programs!

The screenshot shows the 'LPprogram' interface with the 'ASSETS' tab selected. A table lists assets with columns for Name, URL, Fallback, Used By, and Expiration. A 'SET EXPIRATION' button is visible. Callout 1 points to the multi-select checkboxes, and callout 2 points to the 'SET EXPIRATION' button.

Name	URL	Fallback	Used By	Expiration
LPdemo	http://mercury123.com/LPprogram_LPd...	http://www.wgpeople.com	N/A	None
LPtest2	http://mercury123.com/LPprogram_LPt...	http://www.wgpeople.com	N/A	None

Expiration

- 1 Users can now define when they want Marketo to stop sending an asset to a user
- 2 Let Marketo work for you! Just select one or more assets and hit set expiration to get started!

Next-Gen UX — Engagement Program

Our Engagement Program Streams have received massive changes!

The screenshot displays the 'My Eng Program Demo' interface. At the top, there's a navigation bar with tabs: OVERVIEW, STREAMS (active), ASSETS, SETUP, MY TOKENS, and MEMBERS. A 'Program: ON' toggle is visible. Below the navigation, there are sub-tabs: Content, Leads, and Engagement. The main area shows two streams: 'First' and 'Second'. The 'First' stream has a callout '1' pointing to a card titled 'Every Mon | 11:38 AM PDT' with 'Next Cast: April 16, 2018'. Below this card are two tabs: 'Content' and 'Transition Rules'. The 'Second' stream has a callout '4' pointing to a context menu with options: Delete, Activate All, Edit Transition Rules, Show Archived Content, and Clone. A callout '5' points to a 'Foo Program' card at the bottom of the 'Second' stream. An 'Add Stream' button is located in the bottom right of the stream area. A help icon (?) is in the bottom right corner of the interface.

Engagement Program Streams

Imitates the old UX of engagement programs to help you ease into the new experience

- Streams can now be dragged and dropped
- Content, Leads, and Engagement views are easy to toggle
- Engagement Programs can now be activated by a toggle from any screen on the engagement program
- Users can access stream actions such as: Cloning, Activate/Deactivate All, Show Archived Content, etc.
- Each stream's limit has increased from 15 to 25

Next-Gen UX — Smart Campaigns

Saved Rules and Saved Flows

The screenshot displays the 'SMART LIST' tab of a campaign configuration tool. The main area is divided into two sections: 'The following events will start the campaign' and 'All filters must apply to qualify for smart campaign'. The first section contains two trigger cards: 'ADDED TO LIST' and 'ENGAGEMENT PROGRAM STREAM CHANGES'. The second section contains three filter cards: 'ACQUISITION DATE' and 'ACQUISITION PROGRAM'. On the right side, there is a 'Smart Campaign Actions' dropdown menu. This menu is open, showing a search bar and a list of actions. A red circle with the number '1' highlights the 'SAVED RULE' option. A red circle with the number '2' highlights the 'Save Smart List Rule' option. A red circle with the number '3' highlights the 'TRIGGER' section of the menu. A red arrow points from the 'Save Smart List Rule' option to a separate callout box on the right.

- Clone
- Delete
- Move
- Save Smart List Rule

Saved Rules and Flows

Users can now find a new way to apply rules to a smart campaign through the Saved Rules panel on the filters and triggers column. This feature will allow users to apply a set of premade filters and triggers customized by you.

To Create a Saved Rule:

- 1 Just drag your trigger and filter cards to the center to apply them to your smart campaign
- 2 Open the Smart Campaign Actions dropdown menu and select Save New Rule and name your set of triggers/filters
- 3 Now you can apply this saved set to any smart campaign the same way you applied a trigger card or filter.

Next-Gen UX — Updated Tree

The screenshot displays the 'MARKETING ACTIVITIES' interface. On the left is a dark-themed tree view with a search bar and various folders and assets. A '4' in a circle highlights a folder icon. In the center is a 'CHOOSE DATE RANGE' panel with a dropdown set to 'Six Months' (marked with a '1' in a circle), a 'LABELS' section (marked with a '2' in a circle), and a 'TYPES' section (marked with a '3' in a circle). On the right is a detailed view of a 'Batch Campaign' asset, showing its status (e.g., 'Has run, no upcoming', 'Scheduled to run', 'Recurring', 'Never run', 'Invalid') and a 'Trigger Campaign' section with sub-statuses like 'Activated', 'Campaign is requested', 'Invalid', and 'Inactive'. A '5' in a circle highlights a folder icon in the tree view. A 'RESET' button is visible at the bottom of the filter panel.

① **Change Load Date Range**
Users can now look into a specific time frame for assets. The tree will display all assets that have been modified within the selected date range (i.e. an email program that was modified 2 months ago will show in the Last 3 Months filter, but not the Last Week filter).

② **Label Filtering**
Users are now able to apply labels to any asset's detail page and search by label straight from the filter panel

③ **Extended Filters**
With the new tree design, the filters section will now let users apply more filters all at once. Apply one category of filters, one specific state, or even both!

④ **On-demand Loading** 
This folder icon indicates that the folder contains assets that have not been modified within the specified date range. Clicking the folder will reveal all assets in that folder regardless of the current selected date range.

⑤ **New Icons/States/Badges**
We updated our iconography to give users better understanding of the assets. We also provide better states for our campaigns so users will no longer have to guess about the status of a campaign.