Secure marketing with Nexl Engage

Technical documentation: Nexl Engage

Overview

Nexl Engage represents the latest innovation in email marketing solutions, seamlessly integrating with Nexl CRM to provide a robust Email Marketing System (EMS). This document outlines the technical specifications, security measures, and best practices to ensure optimal performance and security for our clients.

Components of Nexl Engage

- **Email Builder and Templates:** Craft engaging emails with our drag-and-drop HTML email builder and access a variety of templates for different needs.
- **Email Sending and Deliverability:** Leverage our sophisticated system for high deliverability rates, including domain authentication and email sending practices.
- **Email Marketing Analytics**: Gain insights into your email campaigns with analytics on sends, deliveries, opens, clicks, bounces, spam reports, and unsubscribed.

Domain Setup

To utilize Nexl Engage effectively, you must authenticate your domain. This process involves creating a subdomain (e.g., engage.yourdomain.com) and adding DNS records to ensure emails are sent from your domain without affecting its sender reputation. You can read more about the benefits of a subdomain towards the end of the documentation.

Required DNS Records

- **SPF (Sender Policy Framework):** Validates sending server IPs.
- **DKIM (DomainKeys Identified Email):** Uses cryptographic methods for email validation.
- **CNAME:** For tracking email clicks and opens.
- **MX Records:** To enhance email deliverability.

Note: DNS changes may take 24-48 hours to propagate. Your specific DNS setup instructions will be shared by Nexl once your domain has been created within Nexl Engage.

Enhanced Security Measures with Nexl Engage

Nexl Engage prioritizes email security and deliverability by adopting advanced security protocols that protect against domain spoofing and enhance email integrity:

- **DMARC:** Verifies email authenticity, reducing phishing risks by specifying how unauthenticated emails should be handled.
- **BIMI:** Elevates brand visibility and email trust by displaying the sender's logo, contingent on DMARC authentication.
- **MTA-STS:** Secures email transit by enforcing encryption, protecting against interception and tampering.
- **SMTP TLS Reporting (TLS-RPT):** Offers insights into email delivery issues related to encryption, aiding in the identification and resolution of security vulnerabilities.

These measures collectively bolster email security, ensuring Nexl Engage clients maintain high deliverability and build trust with their audience through verified and secure email communications.

Sender Reputation and Deliverability Overview

Maintaining a strong sender reputation is crucial for email marketing success, as it directly impacts deliverability. Nexl Engage supports clients in setting up and authenticating their domains, including SPF, DKIM, CNAME for click tracking, and MX records. This process ensures emails are seen as legitimate, building a positive sender reputation with ISPs.

Through our partnership with Mailgun, a leader in email infrastructure known for delivering 45.7 billion emails in a single month (November 2023), we ensure high deliverability and reliable inbox placement. Nexl Engage encourages adherence to email marketing best practices like consistent email volume, engaging content, and proactive performance monitoring, boosting clients' email success.

Mailgun: Our Trusted Email Infrastructure Provider

Nexl Engage leverages Mailgun, a premier email infrastructure provider, for its email deliverability and engagement tracking capabilities. Mailgun's robust platform ensures that our clients' emails not only reach their intended recipients but also provide detailed insights into how recipients interact with those emails. Below, we delve into the certifications and security controls that make Mailgun a reliable and secure choice for handling sensitive data and ensuring compliance across various regulatory frameworks.

Certifications and Compliance

Mailgun's commitment to security and privacy is demonstrated through its adherence to international standards and regulations, including:

- **SOC Types I & II Certified:** Ensuring rigorous security controls and operational practices.
- **GDPR Compliant:** Meeting the requirements of the European Union's General Data Protection Regulation for data privacy and protection.
- **HIPAA Compliant:** Adhering to the Health Insurance Portability and Accountability Act standards for handling protected health information (PHI).
- **ISO 27001 Certified:** Following the best practices for an information security management system (ISMS).
- **PCI-Compliant SAQ-A Merchant:** Complying with the Payment Card Industry Data Security Standard for secure credit card processing.

Enhanced Security Controls

- **Two-Factor Authentication (2FA):** Adds an extra layer of security during account access.
- **SAML Authentication:** Enables secure single sign-on (SSO) capabilities for users.
- **AES-256 Encryption-at-Rest:** Ensures that all customer data is securely encrypted while stored.
- **Encryption via TLS and HTTPS:** Safeguards data in transit against eavesdropping and tampering.
- **Account Lockdown:** Initiates protective measures in cases of suspected compromise.
- **Security-Based Log Retention:** Maintains critical security logs for 365 days for auditing and compliance.
- **Daily Data Back-Ups:** Implements encrypted backups and recovery for all primary databases, enhancing resilience against data loss.
- **Intrusion Detection Systems (IDS):** Monitors for and alerts on unauthorized access attempts, ensuring timely response to potential threats.

Global Email Processing Regions

Understanding the importance of data sovereignty and latency, Mailgun offers multiple regions for processing emails. Nexl Engage primarily utilizes setups in the United States (US) and the European Union (EU), allowing clients to choose the region that best aligns with their operational requirements and compliance needs.

By integrating Mailgun's robust email infrastructure into Nexl Engage, we provide our clients with a secure, compliant, and efficient platform for all their email marketing needs. This partnership ensures that emails not only achieve high deliverability rates but also adhere to the highest standards of data security and privacy compliance.

Data Security, Privacy, and Email Analytics

Data Security and Privacy

Nexl Engage, in partnership with Mailgun, prioritizes the security and privacy of your data while processing email campaigns. Mailgun, a global leader in email infrastructure, processed 45.7 billion emails in November 2023 alone, demonstrating its capacity and reliability in handling large-scale email operations securely.
Data Retention Policies

- **Message Bodies:** Stored for up to seven days to allow for delivery attempts and parsing features. Retention periods may be adjusted based on customer instructions. Secure deletion features are available after delivery.
- **Message Metadata:** Sender, recipient(s), subject line, and routing data are indexed and maintained for 30 days. This facilitates troubleshooting and delivery issues.
- **Suppressions:** Hard bounces, complaints, or unsubscribes result in permanently stored email addresses until removal by the user or account deletion. Suppressions are deleted from our system and backup storages within 30 days after removal.
- **Recipient Data:** Stored in a hashed **(pseudonymization)** format to pre-validate email addresses and optimize delivery processes. This data is exclusively used for service delivery.

Mailgun and Nexl have a robust **Data Processing Agreement** in place, ensuring adherence to data protection laws and regulations. Our commitment to data security extends to employee access, which is strictly governed by confidentiality provisions and routine audits.

Email Marketing Analytics

Nexl Engage offers detailed analytics through Mailgun, providing insights into the performance of your email campaigns. The integration between Nexl and Mailgun allows for real-time syncing of email activity data with Nexl CRM, ensuring you have up-to-date information on your campaigns' effectiveness.

Types of Email Activities Tracked
- **Sends:** The number of emails sent in a campaign.
- **Delivery**: Confirmation of email deliveries.
- **Opens:** Tracking of when recipients open an email.
- **Clicks**: Monitoring which links are clicked within an email.
- **Bounces**: Identifying emails that could not be delivered (hard bounces).
- **Spam Reports**: Tracking when emails are marked as spam by recipients.
- **Unsubscribes:** Recording when a recipient opts out of further emails.

Data Sync with Nexl
- **Delivery:** Recorded as a "Campaign Sent" marketing activity in Nexl against the contact, with the campaign name as its description.
- **Opens and Clicks:** Tracked as "Lead Activities" in Nexl, with the campaign name for opens and "Campaign Clicked" with the URL in the notes section for clicks.
- **Bounces:** Automatically flagged in Nexl. Contacts are marked as bounced, preventing future emails through the EMS until a new email from the address is received, clearing the bounce flag.
- **Unsubscribes:** Synced back to Nexl CRM, updating the contact's marketing consent status to "Unsubscribed," thereby removing them from marketing lists but allowing addition to workspace lists. Manual resubscription is possible, with each consent status change logged within Nexl's audit trail.

Summary
By employing advanced data security measures, detailed data retention policies, and comprehensive email analytics, Nexl Engage, powered by Mailgun's robust email infrastructure, ensures the effectiveness, security, and privacy of your email marketing campaigns. These practices not only safeguard your data but also enhance the impact and reach of your marketing efforts.

Additional Notes:

Sender Reputation and Deliverability

A key component of successful email marketing is maintaining a strong sender reputation, which significantly influences email deliverability. Nexl Engage, in collaboration with our clients, meticulously assists in domain setup processes to ensure that emails are not only authenticated but also maintain the highest standards of deliverability.

Nexl's involvement extends to guiding clients through the authentication of their domains, including setting up SPF, DKIM, CNAME for click tracking, and MX records. This authentication process is crucial for building and maintaining a positive sender reputation, as it signals to Internet Service Providers (ISPs) and email services that the sender is legitimate and trustworthy.

Moreover, Nexl's integration with Mailgun, a leader in email infrastructure, guarantees that clients benefit from the latest in email delivery technology, ensuring that your emails are delivered to your recipients' inboxes reliably. This is supported by Mailgun's impressive track record of delivering 45.7 billion emails in a single month (November 2023), underscoring the effectiveness of its infrastructure in managing email deliverability at scale.

Maintaining a good sender reputation requires adherence to best practices in email marketing, such as consistent email volume, engaging content, proper list management, and a proactive approach to monitoring email performance. Nexl Engage empowers clients to achieve these best practices, enhancing their overall email marketing success.

Nexl can help provide managed services for your DMAR, BIMI, MTA-STS and SMTP TLS Reporting (TLS-RPT).

Email Analytics: Understanding Pixel Tracking

Nexl Engage provides detailed email analytics, including opens and clicks, which are essential for understanding recipient engagement. However, it's important to note that some email providers, due to security settings or preferences, might not automatically load images in emails. This can impact the accuracy of open tracking, which relies on pixel tracking.

However, if an email recipient's email client is set to not load images automatically, as is often the case with clients like Outlook or Gmail with specific privacy settings, the tracking pixel will not be loaded, and the open will not be recorded. This limitation doesn't indicate that the email wasn't opened; rather, it reflects the privacy and security settings of the recipient's email client.

To mitigate this and gain a more comprehensive understanding of engagement, Nexl Engage also tracks other indicators of recipient interaction, such as link clicks, which are not affected by image loading settings. Click tracking involves embedding unique URLs for each link in the email, which allows for accurate monitoring of engagement even when open tracking is limited by image loading preferences.

Understanding the nuances of pixel tracking and the impact of security settings on open rates is crucial for interpreting email analytics accurately. Nexl Engage leverages a combination of open and click tracking to provide a fuller picture of campaign performance, ensuring clients have the insights needed to optimize their email marketing strategies effectively.

FAQ

Does Nexl's DNS setup include a static IP for all emails? Nexl utilizes a dynamic pool of IP addresses for email sending. Our infrastructure leverages smart queuing and IP rotation to maximize deliverability. Your deliverability also depends on your actions and domain reputation. Nexl provides guidance on best practices to maintain a high domain reputation.

Is there a one-click unsubscribe feature? Yes, Nexl offers a one-click unsubscribe feature. Our system mandates the inclusion of an unsubscribe link in all emails, which can be automatically inserted or added through templates.

How are unsubscribes handled in Nexl? Unsubscribes are seamlessly integrated into Nexl CRM, updating the contact record to prevent future emails. We can also import unsubscribe lists from your existing EMS system.

Can a contact who has unsubscribed be resubscribed manually? Yes, manual resubscription is possible. You must document the consent's provision date and reason. Nexl maintains an audit trail for consent changes, ensuring compliance and flexibility.

Are unsubscribes managed on an individual or publication basis? Unsubscribing is managed at the contact level, though Nexl's preference management system allows users to adjust their topic subscriptions without fully unsubscribing.

Does Nexl Engage require a privacy link for sending emails? Emails must be sent using templates that include unsubscribe links and GDPR, CCPA compliance details.

How does Nexl ensure email deliverability? Nexl optimizes your domain setup for reputation and security, verifying configurations for maximum deliverability. We assist with list segmentation and provide setup verification, including subdomain, DKIM, SPF, DMARC, and CNAME records, to enhance email deliverability. Your sending behavior is crucial to deliverability success.

What does domain setup entail for using Nexl with our domain? Nexl assists with domain setup, including subdomain creation and verification of DKIM, SPF, DMARC settings, CNAME records for click tracking, and suggestions for BMI and MX records setup.

Is Nexl's email delivery system whitelisted? Yes, Nexl employs a leading email deliverability system recognized across the industry.

Can Nexl link to payment platforms for event registrations? While direct integration with payment platforms is not available, Nexl forms and workflow automations can redirect users to payment platforms, such as Stripe.

FAQ

Can existing emails be imported into Nexl's Template Builder? Nexl pre-creates email templates during onboarding. These templates can be duplicated and customized as needed.

Is there a double opt-in feature? Double opt-in is not standard but can be configured using Nexl's workflow automation upon request.

Can Nexl track RSVPs and log them in the CRM? Yes, Nexl forms track RSVPs within workspaces and log activities in the CRM. Both blank and pre-filled forms can be generated.

How can RSVP and email campaign data be reported? Nexl CRM natively integrates with Nexl Engage, automatically logging all activities, including opens, clicks, bounces, unsubscribes, RSVPs, and event attendance.

Can the platform automatically confirm event attendance? Yes, Nexl Forms can send automated follow-up emails confirming event details and adding the event to attendees' calendars.

Can campaigns be easily cloned or copied? Yes, Nexl Engage allows for easy duplication of campaigns within a workspace, streamlining event email creation.

Can templates be updated by users? Absolutely. Nexl features a modern drag & drop email builder for creating and updating an unlimited number of templates.

Do templates automatically update to reflect HTML and email provider changes? Yes, our email builder ensures templates are always up-to-date with the latest HTML and CSS standards.

Can event RSVP statuses be shared with lawyers without exporting reports? Yes, Nexl provides live, read-only views of RSVP lists to lawyers, eliminating the need for report sharing.

Can "add to calendar" links be sent with event invites? Yes, Nexl's email marketing system includes the ability to generate calendar files or attach files to email campaigns.

Does Nexl integrate with Teams or Zoom for tracking event attendees? Integration with Teams or Zoom is planned for mid-April, allowing for easy import of event attendees.

nexl

Nexl fosters law firm collaboration and client engagement with its streamlined, user-friendly collaboration cloud.

To get started with Nexl, visit us at **https://nexl.cloud** today!

About NEXL™

Nexl is a leading provider of innovative legal technology solutions aimed at creating efficiencies, accelerating growth and providing data-driven insights that drive smart decision making. We offer scalable solutions for law firms of all shapes and sizes

Founded by legal professionals with vast experience working within legal firms, Nexl grew out of a desire to fundamentally change the way that legal firms grow and engage with internal and external stakeholders. The existing way of managing these relationships doesn't work. Today, we're driving the delivery of smart, innovative and technology-driven services to clients worldwide.

Smart, insight-driven solutions underpin Nexl's purpose. Drawing from our own practical experience working within the professional services industry, our purpose is to develop and deliver technology solutions that will drive positive change in how law firms manage their client relationships and grow their practice.