Concep Send for Infor CRM – User Guide

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Version: 3.0.0 for codebase v3.0.0.0 [for CC2 & SalesLogix v7.5.x]
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CONTENTS

1.0 SYSTEM OVERVIEW

The Concep Send for Infor CRM application is designed to easily integrate within Infor CRM with minimal impact upon the existing system.

There are two parts – the Infor CRM client side, enabling you to upload campaign targets to Concep and the Concep Send For Infor CRM (known as Concep2SLX) Server component which is a windows service that polls the Concep server and downloads user interactions/activities (URL Clicks, File Downloads, Undeliverables etc) into Infor CRM.

As a user, you will simply use Infor CRM & Concep in the normal way – the two will then work together seamlessly and deliver results directly into Infor CRM.
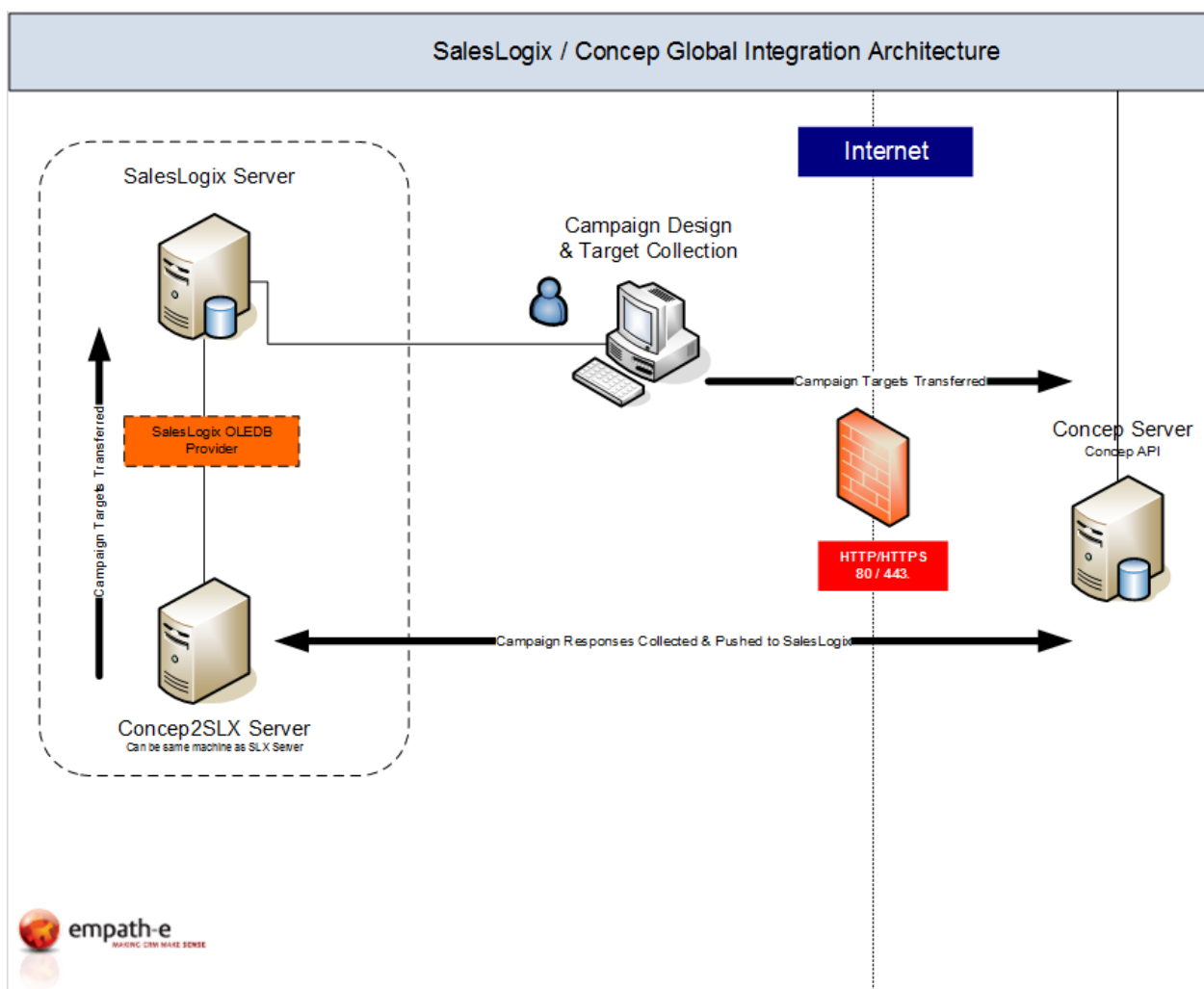
2.0 CAMPAIGN SETUP

Within Infor CRM

Create your marketing campaign as normal. After you have added your targets, you are ready to submit those to Concep.

We now have 115 potential targets in the campaign. We will now use **Export to Concep Send** to send this to Concep Send.

Select the **Export to Concep Send** button on the Targets tab.

The following screen then appears:

You are now about to send these targets into the Concep system.

Be sure to copy/note the **CampaignID**, as you will need this when creating the campaign within Concep.

Press **Export to Concep Send** to begin the transfer.
After a short period, the campaign targets will be transferred.

NOTE: You can run this option as many times as you like – the data in Concep is not duplicated, it is checked and updated as necessary.

This completes this part within Infor CRM. You will now complete the next part within Concep itself.

Within Concep

Use the **"Login to Concep Send"** button and go into Concep Send.

Select the **Contacts | Groups** option and notice that your address book group **"My List 1"** now exists – and it is populated with all of the, unique, campaign targets. You can now use this to build your campaign.

If you look at an individual contact, you will notice all the information from Infor CRM (that is needed) has also been populated. Including the external ID for those that are interested.

3.0 CAMPAIGN DESIGN

Within Concep

Now that you have your target audience, you can begin the campaign email design phase. From the main screen, create your campaign as you would do ordinarily. On the drop down next to the campaign name select **More**.

On page 5 you recorded the Infor CRM **CampaignID.** Be sure to add this to the **Details** tab within Concep – otherwise **no** responses can be inserted to Infor CRM for this campaign.

On the **Content** tab – create your campaign content as normal. Be sure to add any links and download files that you wish.

On the **Recipients** tab – select the "My List 1" group of contacts

You are now ready to launch your campaign ! Press **Send Campaign Now (xxx)**

Within a few minutes, the Campaign Sent/Viewed & Click information should start to be delivered back to Infor CRM!

Now switch back to Infor CRM.
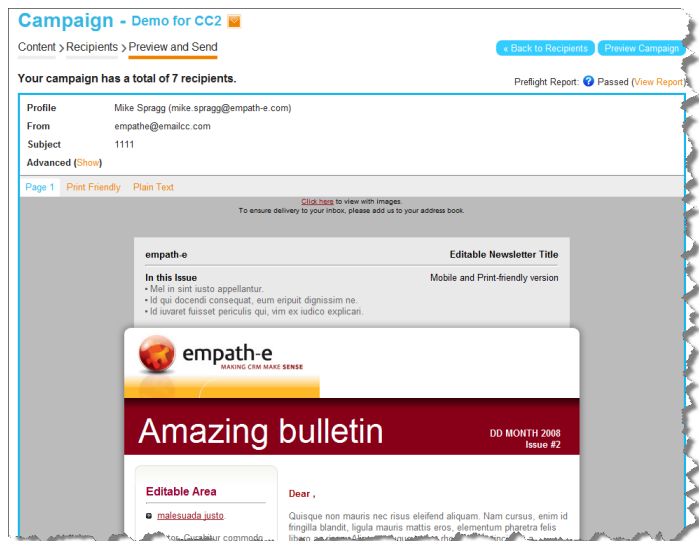
Within Infor CRM

Switch to the "**Concep Send**" tab within Campaigns. This tab is Grouped by contact.

Immediately, we can see the campaign was sent to the contacts and, in some cases, was undeliverable (this is expected, as this is demo data!).

Now, as people click on the links and download files from the email – you will be able to track that information. You can also double-click the line item and you will be taken to whatever they viewed at that time/date.

For an individual, you can also see there responses to campaigns at the Contact level.

From here, you can create reports/exports etc. via Query Builder as necessary. You can use the **Status** column to build groups based on Opt-Outs,

Undeliverables etc. as defined by your administrator. For example, when a contact Opts Out the Status is set to "Open" so you can easily create groups for follow-up purposes and additional data-checking as needed.