



empath-e

MAKING CRM MAKE SENSE

Concep Send for Infor CRM – User Guide

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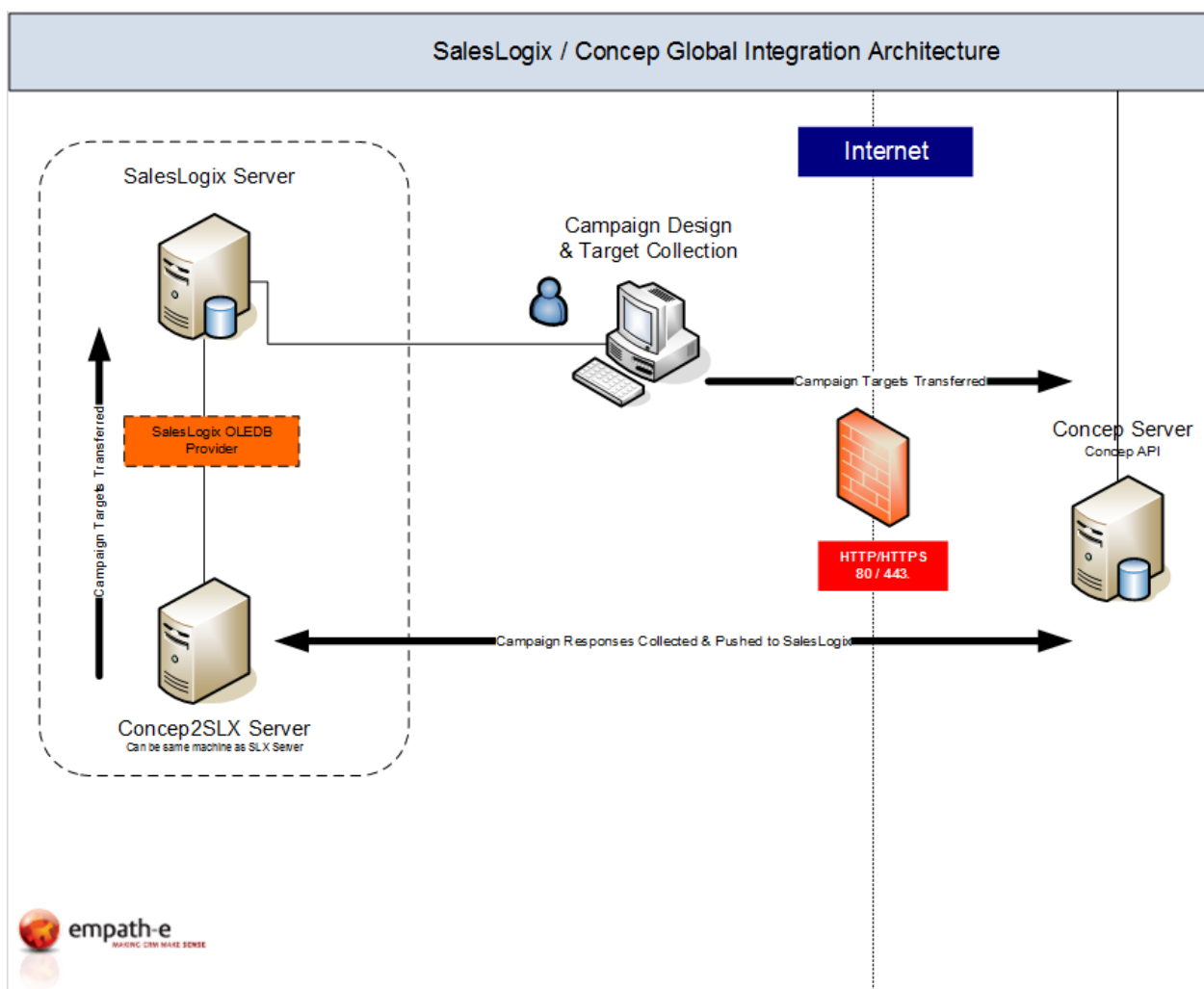


1.0 SYSTEM OVERVIEW

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.

The screenshot shows the 'Campaigns' interface. The campaign name is 'Test Campaign', description is 'Shows data coming from Concep Send', and status is 'Active'. It has 115 targets. The 'Targets' tab is selected, showing a list of 115 targets with columns for Name, Company, Group, Priority, Initial, Status, Last Stage, Last Update, Last Response, and Type. The 'Export to Concep Send' button is visible in the toolbar above the table.

Name	Company	Group	Priority	Initial	Status	Last Stage	Last Update	Last Response	Type
Spragg, Mike	empath-e Limited	Xmas 2014		<input type="checkbox"/>			28/04/2015		Contact
Roche, Gary	iCS Communications	Xmas 2014		<input type="checkbox"/>			28/04/2015		Contact
Wainwright, Tim	Wainwright Bros. & Co. Ltd	Xmas 2014		<input type="checkbox"/>			28/04/2015		Contact
Fraser, Hugh	Fraser Group Ltd	Xmas 2014		<input type="checkbox"/>			28/04/2015		Contact
Banwait, Lakhbinder	Syscap Limited	Xmas 2014		<input type="checkbox"/>			28/04/2015		Contact
Bryce, Ralph	Polar Instruments Ltd	Xmas 2014		<input type="checkbox"/>			28/04/2015		Contact
Mitcham, Nicola	OAG	Xmas 2014		<input type="checkbox"/>			28/04/2015		Contact
Cockman, Stuart	OAG	Xmas 2014		<input type="checkbox"/>			28/04/2015		Contact

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 screenshot shows a close-up of the 'Targets' tab toolbar. The 'Export to Concep Send' button is highlighted with a red box. Other buttons visible include 'Concep Send', 'Targets', 'Targets...', and 'Export'. A checkbox for 'Display results when opened' is also visible.



The following screen then appears:

Export to Concep Send - Export Contacts

 **List Exporter**

You have selected a list of 115 leads and/or customers to export to Concep Send. Please enter a group name and click on the 'Export to Concep Send' button.

Be sure to copy the CampaignID (shown below) to the Advanced Tab within Concep Send as you create it.

Campaign:

Campaign ID:

Group Name:

[Login to Concep Send](#)

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.

CONTACTS

The screenshot shows the 'CONTACTS' interface with tabs for 'Groups', 'Contacts', and 'Domains'. The 'Contacts' tab is active. At the top right, there are links for 'Add Group', 'Add Contact', 'Import Contacts', and an 'Advanced...' dropdown. Below these are 'Shared Groups' and 'Dynamic Groups' sections. A search bar is present with the text 'With selected groups (1): Perform...'. A table lists various contact groups with columns for Name, Contacts, Score, Updated, and Created. The 'My List 1' group is highlighted and has a mouse cursor over it.

Name	Contacts	Score	Updated	Created
a_DupeTest	23	0	04 Dec 13	04 Dec 13
Birthday Group	1	0	10 Dec 13	14 Feb 09
Business Partners	77	0	10 Dec 13	27 Mar 09
July-Pricing	57	0	10 Dec 13	01 Jul 09
June 2011	80	0	10 Dec 13	05 Jun 11
Moonbear	185	0	10 Dec 13	04 Sep 10
Move Group	117	0	10 Dec 13	11 Feb 09
My List 1	111	0	1 min ago	1 min ago
QDEMOA000JYH	10	0	11 Feb 15	11 Feb 15

Edit Contact: Mike.Spragg@empath-e.com

The screenshot shows the 'Edit Contact' form for Mike.Spragg@empath-e.com. The form has tabs for 'Name and Email', 'Other Fields', 'Custom Fields', 'Groups', and 'History'. The 'Name and Email' tab is active. The form contains fields for Gender (Male/Female), Title, Salutation, Birth Date (15/07/1968), Address Line 1 and 2, City (Southampton), State, Zip/Postal Code, Country (United Kingdom), Phone (+44 (0) 845 1358444), Mobile, Fax, Email Format (HTML/Plain Text), and External Contact ID (C6UJ9A000002). A red arrow points to the External Contact ID field.

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.

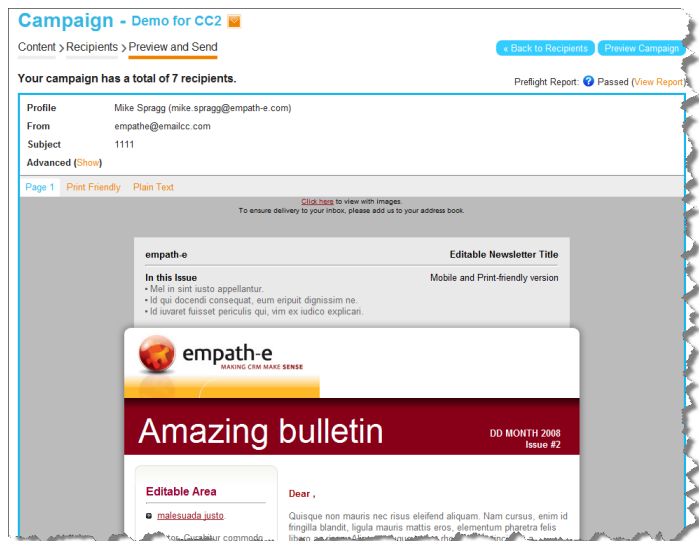
On the **Content** tab – create your campaign content as normal. Be sure to add any links and download files that you wish.

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.

Response Date	Account	Action Type	cMap Account	Status	Action Detail
04/05/2012 13:00:08	First DataBank Europe Ltd	Campaign Sent	AdamT	Closed	
- Contact Name : Edwards, Graham					
04/05/2012 13:00:08	Data Track Technology plc	Campaign Sent	AdamT	Closed	
- Contact Name : Field-Richards, Victoria					
04/05/2012 13:00:08	Quanta Training Limited	Campaign Sent	AdamT	Closed	
- Contact Name : Fortnam, Skip					
04/05/2012 13:49:59	Thermo Fisher Scientific	Link or URL clicked	AdamT	Closed	http://www.empath-e.com/Documents/v753/Fixed
04/05/2012 13:47:54	Thermo Fisher Scientific	Link or URL clicked	AdamT	Closed	http://www.empath-e.com/documents/v754/Fixed
04/05/2012 13:45:46	Thermo Fisher Scientific	Campaign Viewed	AdamT	Closed	
04/05/2012 13:45:46	Thermo Fisher Scientific	Link or URL clicked	AdamT	Closed	http://www.empath-e.com/documents/v754/Fixed
04/05/2012 13:00:08	Thermo Fisher Scientific	Campaign Sent	AdamT	Closed	
- Contact Name : Freire, Mario					
04/05/2012 13:00:08	NetJets (Europe)	Campaign Sent	AdamT	Closed	
- Contact Name : Gathercole, David					
04/05/2012 13:00:08	Data Track Technology plc	Campaign Sent	AdamT	Closed	
- Contact Name : Gaudion, Martyn					
04/05/2012 13:33:27	Polar Instruments Ltd	Campaign Viewed	AdamT	Closed	
04/05/2012 13:00:08	Polar Instruments Ltd	Campaign Sent	AdamT	Closed	
- Contact Name : Gibson, Pete					
04/05/2012 13:00:08	SolutionsPT	Campaign Sent	AdamT	Closed	
				(COUNT=122)	

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.

Response Date	Action Type	Start Date	cMap Account	Status	Action Detail
23/02/2009 12:56:02	Campaign Sent	23/02/2009	empath-e	Closed	
- Campaign Name : Adam Travers					
12/01/2009 19:24:56	Link or URL clicked	09/01/2009	empath-e	Closed	http://www.empath-e.com/
11/01/2009 18:00:06	Campaign Viewed	09/01/2009	empath-e	Closed	
11/01/2009 18:00:01	Campaign Sent	09/01/2009	empath-e	Closed	
- Campaign Name : April 2011 Tech Bulletin					
05/04/2011 14:30:56	Campaign Viewed	04/04/2011	AdamT	Closed	
05/04/2011 14:30:23	Campaign Sent	04/04/2011	AdamT	Closed	
- Campaign Name : April 2012 Tech Bulletin					
04/04/2012 10:02:37	Link or URL clicked	29/03/2012	AdamT	Closed	http://www.empath-e.com/documents/Bulletins/emc
04/04/2012 10:02:29	Link or URL clicked	29/03/2012	AdamT	Closed	http://www.empath-e.com/conceptglobal.asp
04/04/2012 10:02:22	Link or URL clicked	29/03/2012	AdamT	Closed	http://www.empath-e.com/Support/Enhancements/
04/04/2012 10:02:01	Campaign Viewed	29/03/2012	AdamT	Closed	
04/04/2012 10:00:01	Campaign Sent	29/03/2012	AdamT	Closed	
				(COUNT=214)	

