



empath-e

MAKING CRM MAKE SENSE

Concep2SLX – User Guide

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CONTENTS

CONTENTS	2
1.0 SYSTEM OVERVIEW	3
2.0 CAMPAIGN SETUP	4
Within SalesLogix.....	4
Within Concep.....	6
3.0 CAMPAIGN DESIGN	7
Within Concep.....	7
Within SalesLogix.....	8

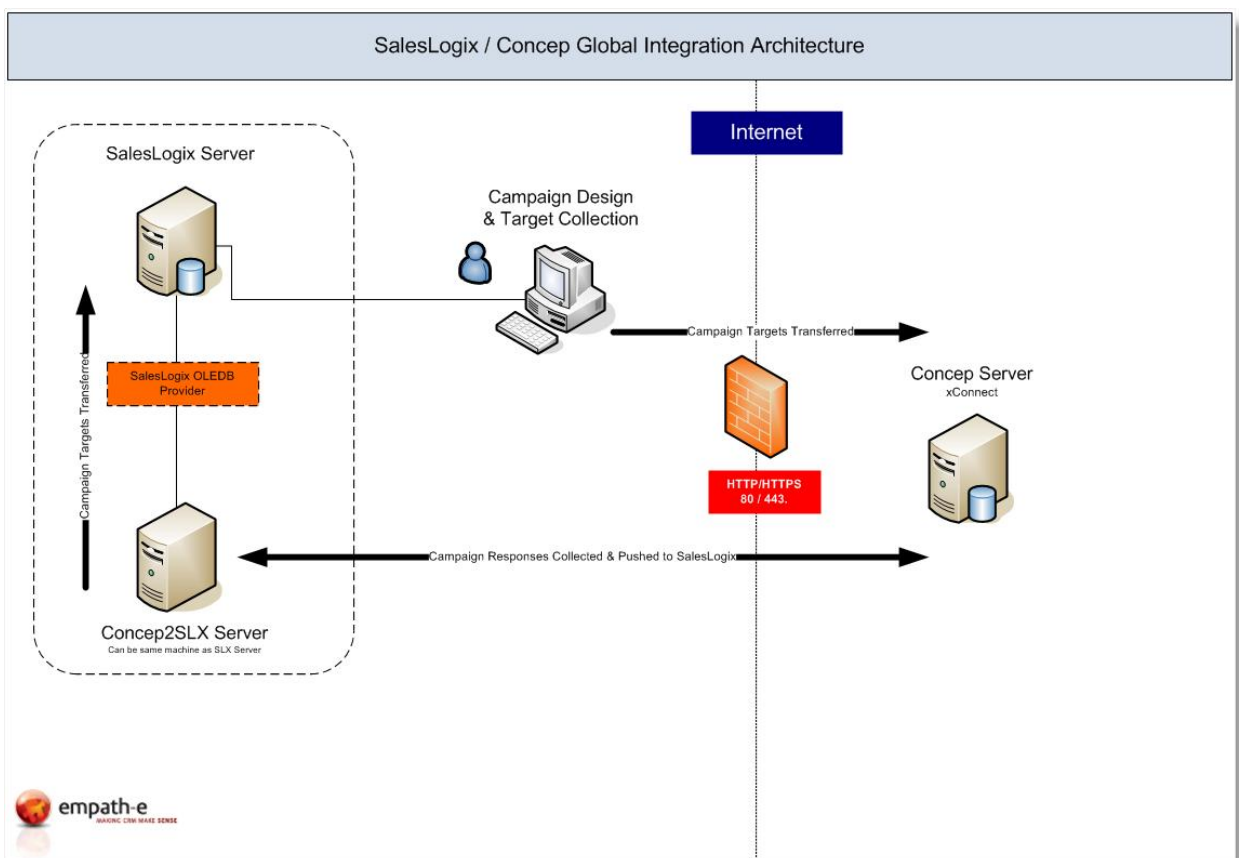


1.0 SYSTEM OVERVIEW

The SalesLogix to Concep Global application has been designed to easily integrate within SalesLogix with minimal impact upon the existing system.

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

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



2.0 CAMPAIGN SETUP

Within SalesLogix

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' window with the following details:

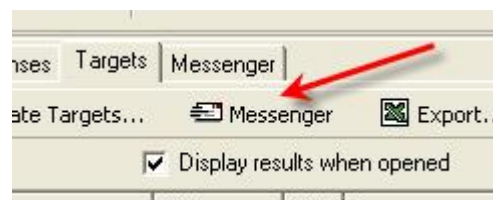
- Campaign Name:** My First Campaign
- Description:** Demonstrate clicks coming back from Concep
- Objective:** (Empty)
- Call to Action:** Free Brochure
- Lead Source:** E-mail - General
- Products:** (Empty)
- Status:** Active
- Code:** FC001
- Start Date:** 26/09/2008
- End Date:** 26/09/2008
- Manager:** Hogan, Lee
- Owner:** Everyone

Buttons include 'Launched to 23 Targets' and 'Copy...'. The 'Targets' tab is active, showing 23 targets with columns: Name, Company, Group, Priority, Initial, Status, Last Stage, Last Update, Last Response, and Type. The 'Spragg, Mike' target is highlighted in blue.

Name	Company	Group	Priority	Initial	Status	Last Stage	Last Update	Last Response	Type
Abbott, John	Abbott Ltd.			<input type="checkbox"/>	Launched		25/09/2008		Contact
Balbo, Lou	Abbott Ltd.			<input type="checkbox"/>	Launched		25/09/2008		Contact
Bates, Peter	Alpert Fan Inc			<input type="checkbox"/>	Launched		25/09/2008		Contact
Carson, Anthony	Audit Dak			<input type="checkbox"/>	Launched		25/09/2008		Contact
Caswell, Tracie	empath-e Limited			<input checked="" type="checkbox"/>	Launched	Stage 1	25/09/2008		Contact
Cavender, Joseph	ATEL Tech Investment			<input type="checkbox"/>	Launched		25/09/2008		Contact
Deiger, Jim	Automotive Printers			<input type="checkbox"/>	Launched		25/09/2008		Contact
Drew, Dean	Abbott Ltd.			<input type="checkbox"/>	Launched		25/09/2008		Contact
Dux, David	Aventail Server Agency			<input type="checkbox"/>	Launched		25/09/2008		Contact
Fincher, Brian	Advising Group			<input type="checkbox"/>	Launched		25/09/2008		Contact
Hardy, Jonathon	Abbott WorldWide			<input type="checkbox"/>	Launched		25/09/2008		Contact
Hendrichs, William	Amtec & Lehman			<input type="checkbox"/>	Launched		25/09/2008		Contact
House, Julie	empath-e Limited			<input checked="" type="checkbox"/>	Launched	Stage 1	25/09/2008		Contact
Malvin, Lindsay	Advising Group			<input type="checkbox"/>	Launched		25/09/2008		Contact
Roehm, John	Alcopter Investments			<input type="checkbox"/>	Launched		25/09/2008		Contact
Scarlata, Pete	Abbott WorldWide			<input type="checkbox"/>	Launched		25/09/2008		Contact
Schroer, Don	American Audio, Inc.			<input type="checkbox"/>	Launched		25/09/2008		Contact
Shiff, Neil	AmSher Research Co.			<input type="checkbox"/>	Launched		25/09/2008		Contact
Spragg, Mike	empath-e Limited			<input checked="" type="checkbox"/>	Launched	Stage 1	25/09/2008		Contact
Sumerall, Jim	Allied Corp.			<input type="checkbox"/>	Launched		25/09/2008		Contact
Trudell, Joel	Artistic Supply			<input type="checkbox"/>	Launched		25/09/2008		Contact
Velazquez, Mike	Abbott Ltd.			<input type="checkbox"/>	Launched		25/09/2008		Contact
Zessner, Louise	Abbott Ltd.			<input type="checkbox"/>	Launched		25/09/2008		Contact

We now have 23 potential targets in the campaign. We will now use **Messenger** to send this to Concep Campaigner.

Select the **Messenger** button on the Targets tab.



The following screen then appears:

The screenshot shows the Baker Tilly Messenger interface. At the top is the Baker Tilly Messenger logo. Below it, a message states: "You have currently selected a list of 23 leads and/or customers. This list will be transferred and available for Messenger. Enter a group name, then press the Send button." A bold instruction follows: "Be sure to copy the CampaignID (shown below) to the Advanced Tab within Messenger as you create it." The form contains three input fields: "Campaign:" with the value "My First Campaign", "Campaign ID:" with the value "QQF8AA0007B1", and "Address Book Name:" with the value "MyList 1". Below these fields is a large empty text area. At the bottom left is a blue link "Login to Concep" and at the bottom right is a "Send to Messenger" button.

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 **Send to Messenger** 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 SalesLogix. You will now complete the next part within Concep itself.

This screenshot shows the same Baker Tilly Messenger interface as the previous one, but with a log window open at the bottom. The log contains the following entries: "25/09/2008 13:01:48 : Start: Converting contacts into XML", "25/09/2008 13:01:49 : Finished: Converting contacts into XML", "25/09/2008 13:01:49 : Sending to Concep server, please wait...", and "25/09/2008 13:01:49 : Sent successfully." The "Send to Messenger" button is now disabled and greyed out. The "Login to Concep" link remains at the bottom left.



Within Concep

Use the **“Login to Concep”** button and go into Concep Campaigner/Messenger.

Select the **Address Book** option and notice that your address book group **“MyList 1”** now exists – and it is populated with all of the campaign targets. You can now use this to build your campaign.

ADDRESS BOOK SEARCH BY NAME OR EMAIL

Select a group name to display individual contacts.

SEARCH or ADVANCED

GROUPS CONTACTS SHARED GROUPS DOMAINS SEGMENTS SUMMARY

NAME	CONTACTS	UPDATED	CREATED
MyList 1	23	-	25 Sep 08

PAGES: 1
 DISPLAYING GROUPS: 1 - 1 OF 1

If you look at an individual contact, you will notice all the information from SalesLogix (that is needed) has also been populated.

GROUPS CONTACTS SHARED GROUPS DOMAINS SEGMENTS SUMMARY EDIT CONTACT

DELETE OPT OUT UPDATE CONTACT

REQUIRED DETAILS

First name
 Mike

Last name
 Spragg

Email address
 mike.spragg@empath-e.com

OPTIONAL DETAILS

Company
 empath-e Limited

Title

GROUPS

Select the groups in which the contact should be stored.

MyList 1

INFORMATION

Basic contact details.

CREATED	12 Oct 07 @ 8:04PM
LAST UPDATED	25 Sep 08 @ 1:01PM
OPTED OUT	No
UNDEL.	No
DELIVERY INTELLIGENCE	Untouched



3.0 CAMPAIGN DESIGN

Within Concep

Now that you have your target audience, you can begin the campaign email design phase. Select your template, as you would do ordinarily and on the **Settings** tab add the following.

HOME
CREATE CAMPAIGN
1. SETTINGS
2. RECIPIENTS
3. FILES AND LINKS
4. QUESTIONS
5. RSVP
6. CONTENT
7. PREVIEW AND SEND

1. Settings 2. Recipients 3. Files/Links 4. Questions 5. RSVP 6. Content 7. Preview/Send

Enter the campaign title, email subject and optionally forward responses to an email address.

THE BASICS PROFILES **ADVANCED**

External campaign ID: QQF8AA0007B1
Optional. Used to assign an ID from a third party system to this campaign.

SAVE SAVE & CONTINUE

On page 5 you recorded the SalesLogix **CampaignID**. Be sure to add this to the Advanced Tab within Concep – otherwise **no** responses will be inserted to SalesLogix for this campaign.

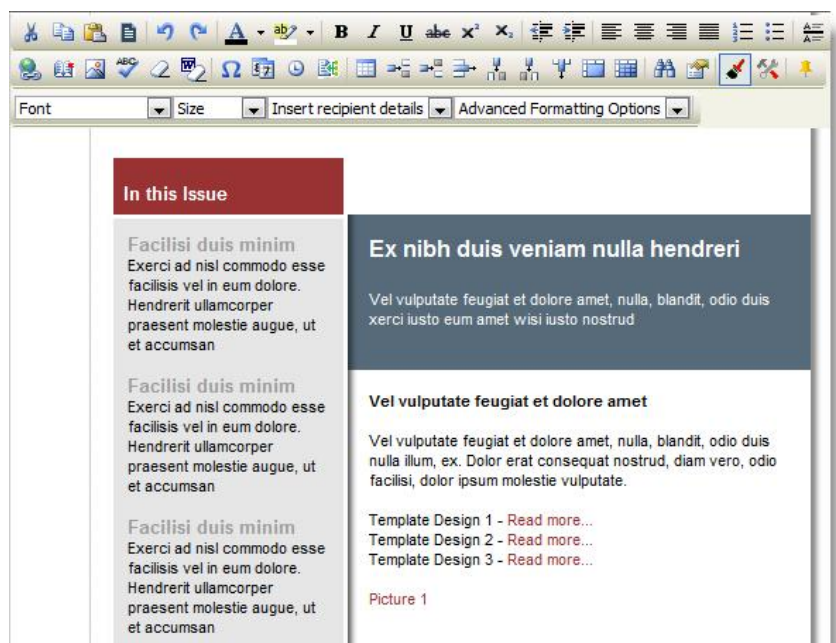
IMPORTANT: You can only define this ID at this stage – ensure it is completed now, or completed prior to launching the campaign within Concep.

- On the **Recipients** tab – select the MyList 1 group of contacts
- On the **Files/Links** tab – enter any files/links you want to add to the campaign
- On the **Questions/RSVP** tab – enter any information as applicable

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

You are now ready to launch your campaign ! Press **Send**.

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



Within SalesLogix

Open the Messenger tab within Campaigns. This tab is Grouped by contact.

Response Date	Account	Action Type	Messenger Account	Status	Action Detail
[-] Contact Name : Caswell, Tracie					
25/09/2008 13:40:29	empath-e Limited	Link or URL clicked	empath-e	Closed	http://www.empath-e.com/
25/09/2008 13:40:24	empath-e Limited	File Download	empath-e	Closed	http://files.cecollect.com/608/9251/Avatar1.jpg
25/09/2008 13:40:16	empath-e Limited	Link or URL clicked	empath-e	Closed	http://www.empath-e.com/crmsolutions.asp
25/09/2008 13:40:08	empath-e Limited	Link or URL clicked	empath-e	Closed	http://www.empath-e.com/
25/09/2008 13:39:56	empath-e Limited	Campaign Viewed	empath-e	Closed	
25/09/2008 13:26:15	empath-e Limited	Campaign Sent	empath-e	Closed	
+ [Contact Name : Cavender, Joseph					
+ [Contact Name : Deiger, Jim					
[-] Contact Name : Drew, Dean					
25/09/2008 13:30:08	Abbott Ltd.	Undeliverable	empath-e	Open	
25/09/2008 13:26:15	Abbott Ltd.	Campaign Sent	empath-e	Closed	
+ [Contact Name : Dux, David					
+ [Contact Name : Fincher, Brian					
+ [Contact Name : Hardy, Jonathon					
+ [Contact Name : Hendrichs, William					
[-] Contact Name : House, Julie					
25/09/2008 13:26:15	empath-e Limited	Campaign Sent	empath-e	Closed	
25/09/2008 13:49:28	empath-e Limited	Link or URL clicked	empath-e	Closed	http://www.empath-e.com/
25/09/2008 13:49:21	empath-e Limited	Campaign Viewed	empath-e	Closed	
+ [Contact Name : Malvin, Lindsay					
+ [Contact Name : Roehm, John					
+ [Contact Name : Scarlata, Pete					
+ [Contact Name : Schroer, Don					
+ [Contact Name : Shiff, Neil					
[-] Contact Name : Spragg, Mike					
25/09/2008 13:39:26	empath-e Limited	File Download	empath-e	Closed	http://files.cecollect.com/608/9251/Avatar1.jpg
25/09/2008 13:39:21	empath-e Limited	Link or URL clicked	empath-e	Closed	http://www.empath-e.com/crmsolutions.asp
25/09/2008 13:39:15	empath-e Limited	Link or URL clicked	empath-e	Closed	http://www.empath-e.com/
25/09/2008 13:39:12	empath-e Limited	Campaign Viewed	empath-e	Closed	

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.

Response Date	Action Type	Start Date	Messenger Account	Status	Action Detail
[-] Campaign Code : FCD01					
[-] Campaign Name : My First Campaign					
25/09/2008 13:39:26	File Download	26/09/2008	empath-e	Closed	http://files.cecollect.com/608/9251/Avatar1.jpg
25/09/2008 13:39:21	Link or URL clicked	26/09/2008	empath-e	Closed	http://www.empath-e.com/crmsolutions.asp
25/09/2008 13:39:15	Link or URL clicked	26/09/2008	empath-e	Closed	http://www.empath-e.com/
25/09/2008 13:39:12	Campaign Viewed	26/09/2008	empath-e	Closed	
25/09/2008 13:26:15	Campaign Sent	26/09/2008	empath-e	Closed	

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.

