CleverReach™ Connector

user‘s manual

Manual Version 1.0

CRM CleverReach Connector - Manual

1. Edition

Trade Marks

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1. Purpose

The CRM CleverReach™ extension connects CleverReach™ with the CRM and provides CRM data to use in CleverReach™ or CleverReach™ data to use in the CRM.

The following features are provided:

- ✓ Fast installation as CRM extension
- ✓ Use of CRM's custom lists or single contact entries
- ✓ Consideration of privilege settings
- ✓ Full support of CleverReach™ features

2. Create a CRM - CleverReach™ Connection

In order to have a working CRM - CleverReach™ connection, the following 3 steps are required:

1. Get a CleverReach™ account
2. Enter CleverReach™ access data into the CRM
3. Create a CleverReach™ list

2.1. Get a CleverReach™ account

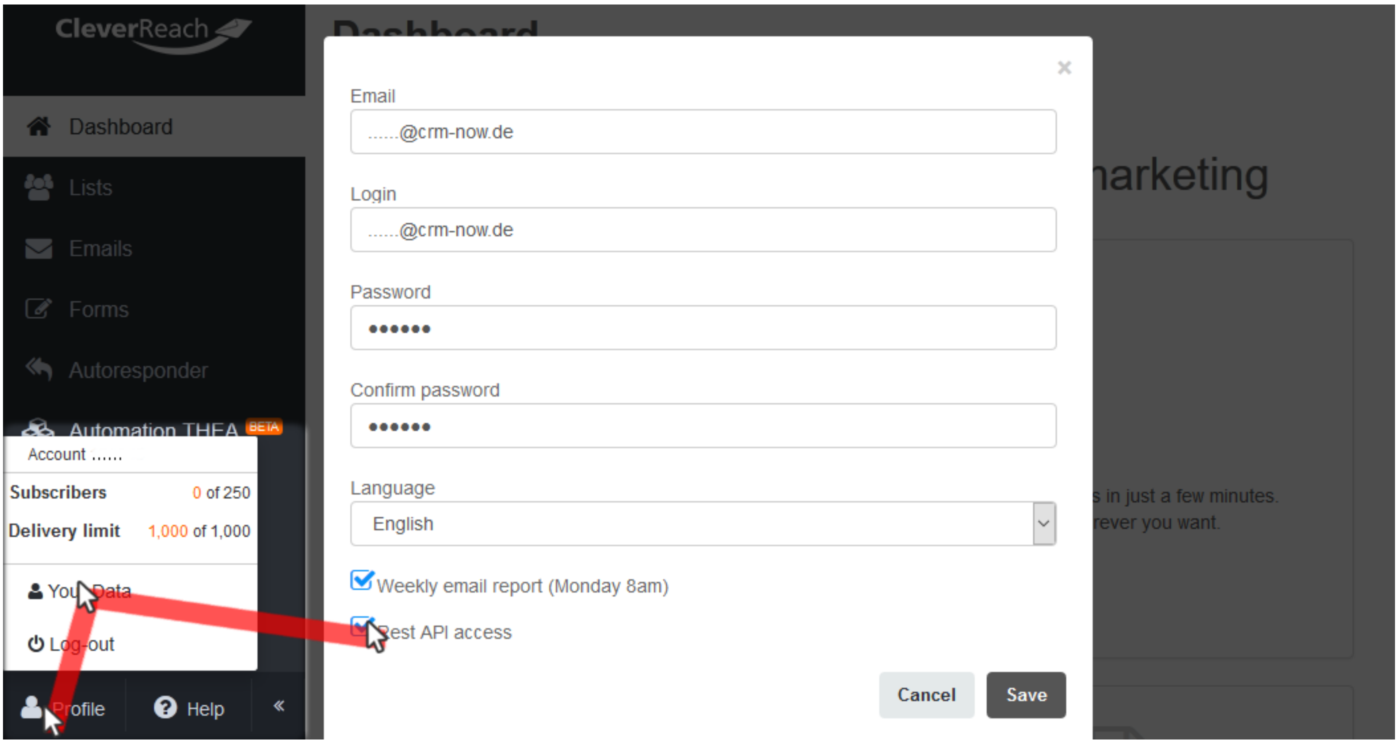
To get a CleverReach™ account open the following URL:

https://www.cleverreach.com/

Click „Sign Up For Free“ and follow the instructions. Make sure you enter a valid email address so you can receive a confirmation email. Click the confirmation link from that email.

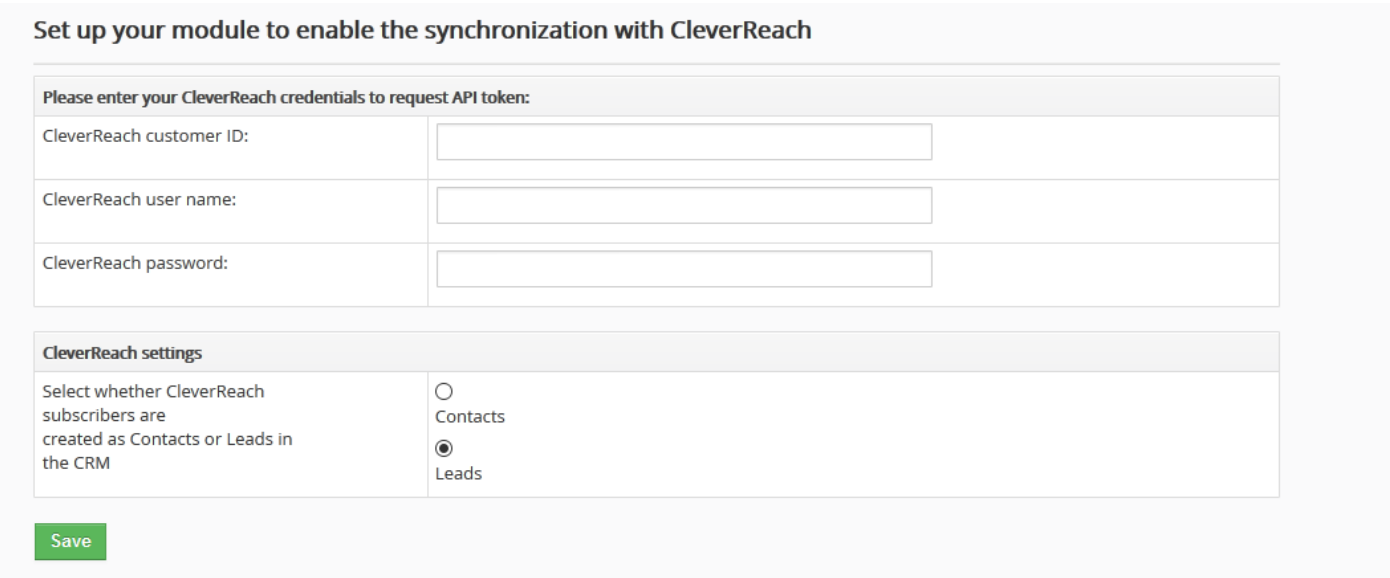
2.2. Activate API Access

Login to CleverReach™ and enter the menu **[Profile]** -> **[Your Data]**. Make sure REST-API access is activated.



2.3. Enter CleverReach credentials into the CRM

As CRM administrator goto the menu **[Settings]** -> **[CleverReach]**, as shown in the following figure:



Enter your credentials and click **[Save]**. The CRM will try to establish access to the CleverReach™ API and will inform you about failure or success. Additionally you need to decide whether new entries from CleverReach™ are going to create new Contacts or Leads in the CRM.

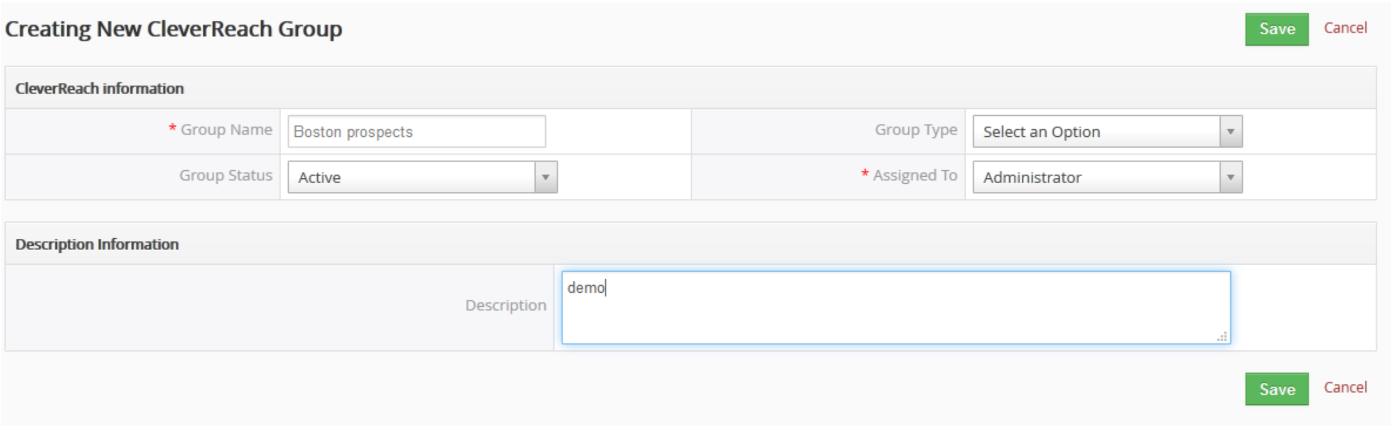
2.4. Create List in CleverReach™

CleverReach™ uses so called Lists for organizing the mailings. Within a List you may see all recipients. The CRM need at least one List in CleverReach™ for its operation.
To create a List go to the **[Lists]** menu and click **[Add list]**. Follow the instructions. You may create as many lists you need. These lists will be also available at the CRM.

3. Use of the CleverReach™ Connector

3.1. Create Group at the CRM

Go to the CRM menu **[Marketing]**->**[CleverReach]** and create a new entry. This is called a CleverReach group entry and is identical with a list entry at the CleverReach™ system. The following figure is an example.



The following user scenario explains how to use the grouping:
Let's assume we have created a list at CleverReach™ with the name 'Tradeshow New York 08/13'. We would like to invite prospects from New York, Boston and Washington DC with a serial email. We also assume that we will also use these prospect lists for further mailings in the future.
We want to make the mailing list compilation only once and do the following:

1. Create a CRM group entry with the name 'Boston prospects' and add all prospects from the Boston area to this group.
2. CleverReach™ synchronization of this group for the list 'Tradeshow New York 08/13'
3. Create a CRM group entry with the name 'New York prospects' and add all prospects from the New York area to this group.
4. CleverReach™ synchronization of this group for the list 'Tradeshow New York 08/13'
5. Create a CRM group entry with the name 'Washington DC prospects' and add all prospects from the Washington DC area to this group.
6. CleverReach™ synchronization of this group for the list 'Tradeshow New York 08/13'

This will add all prospects to the CleverReach™ list 'Tradeshow New York 08/13', to be accessed by the menu **[Lists]** -> 'Tradeshow New York 08/13'. The list of subscribers is an assembly of the content in the related groups:

Tradeshow New York 08/13 =

Boston prospects +

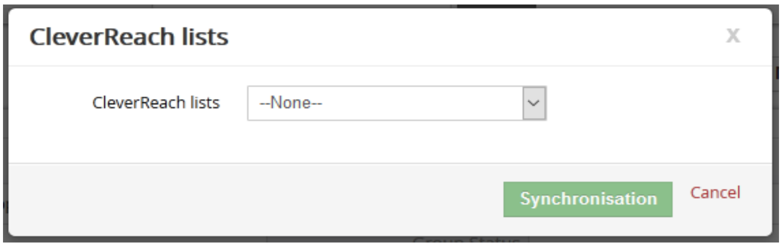
New Yourk prospects +
Washington DC prospects

You may create a new list in CleverReach™ and add the same groups if desired.

3.2. Synchronize a CRM Group Entry with CleverReach™

Once you have created a CleverReach™ group in the CRM you may use the related entry menu at a group's detail view to add subscribers. You may add single subscribers or subscribers from a customized list view (how to build a customized list is explained in the CRM manual).

After you have added all related entries you may click **[Start syncronization]** located at the right upper side of the detail view. This will open a new popup dialog as shown in the next figure:



You may select the CleverReach™ list you want to use for synchronization.
When done you may start your mailing at the CleverReach™ system.

4. Support

You may contact crm-now with any question you may have 24/7 by email, phone or fax.

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crm-now improves this extension from time to time. Before you contact crm-now make sure you have the actual version installed.
In order to provide you a good support we will need form you the following information:

- The CleverReach Connector Version used (see Info menu)
- An accurate description of your issue, in case of an error with screenshots
- Your email address

All inquiries will be answered. If you do not get an answer within one business day, crm-now did not receive your message. In this case please contact crm-now again.