crimson

Crimson: Email Integration

The Email integration features allow clients to connect their email marketing platforms and authorize Crimson to push a list of emails to the platform using the robust People Search segmentation filters available. Below is a list of currently available email platforms for integration:

How to Setup Integration

NOTE: Only Crimson **Project Admin** users can enable these settings.

1. Log into Crimson and click on the **My Account** dropdown located in the top right corner of Crimson and select the **Account** settings option.

2. Click on the button that appears in the top right corner of the new window.

3. The Organization Info will appear. Click on at the footer of the screen.

4. Select the desired email platform integration to be enabled for your

   account:

5. Log into the selected platform.

6. Once you have successfully been authorized by the platform, you may start creating new segmentation lists.

How to Upload a List

1. Run a People Search using the filters of your choice.

   Ex:
2. Choose the "**Create Email List**" menu in form the output options available.

3. Select an integrated Email Platform.

4. Create the new List.

    - Enter the preferred **List name**
    - Choose an update type (One-time VS Periodic)
    - If you select Periodic, you can select the preferred intervals of days, hours, or minutes (the list will default to 12 hours if none selected).
    - Select any additional custom fields you would like to push to your email provider.
5. Click **Save** when done.
6. Once saved, the Crimson Email Integration Service will queue to process and upload the subscriber details to the selected email platform.
7. Once the upload is complete, you will receive a Crimson Confirmation Notification.
8. You can then check and email the new subscriber list in the email platform selected.

Manage "Periodic" Lists

1. To manage "Periodic" syncing lists, click on the **My Account** dropdown located in the top right corner of Crimson and select the **Account** settings option.

2. Click on the button that appears in the top right corner of the new window.

3. The Organization Info will appear. Click on at the footer of the screen.
4. Select the enabled email platform integration for review.
5. Click the "Email Lists" button under the correct account to view a list of "Periodic" syncing lists established.

6. View, Edit, or Delete the list as needed.

7. Click to see the list of updates made to existing lists.

8. Filter by list, type, or status or click to see the update log.