


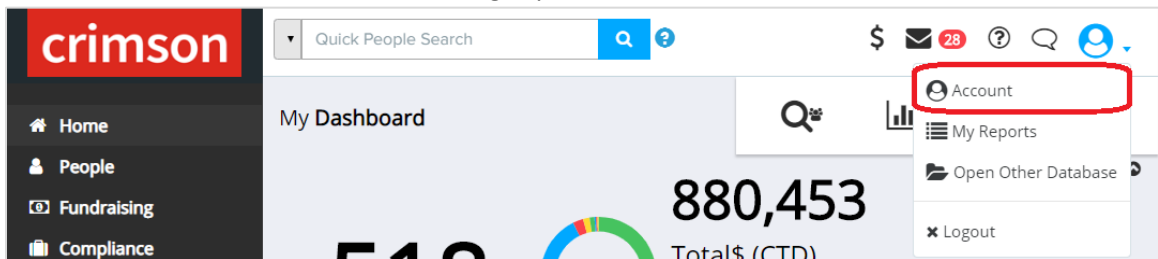
The Email integration features allow clients to connect their email marketing platforms and authorize Crimson to push a list of emails to the platform using the robust People Search segmentation filters available. Below is a list of currently available email platforms for integration:

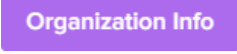



How to Setup Integration

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

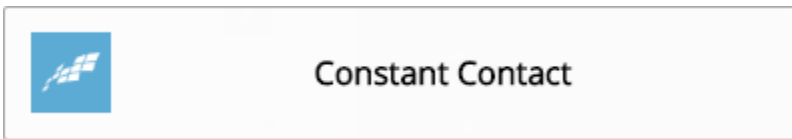
1. Log into [Crimson](#) and click on the  **My Account** dropdown located in the top right corner of Crimson and select the **Account** settings option.



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.

A screenshot of the "Organization Info" form. The form is titled "Organization Info" and has a "Back" button and a close button in the top right. The form contains several input fields: "Title" (CMDI Crimson - Washington for Congress), "Address" (1593 Spring Street, Tysons Corner, VA, USA), "Name" (Washington for Congress), "Phone" ((703) 790-8676), "Project Type" (Federal House Campaign), "Fax" ((703) 790-9389), "Target Date" (11/03/2020), "Target Date Caption" (Days Until Election), "Email" (samaya@cmdi.com), "Annual Spending Budget" (450000), and "URL" (http://www.cmdi.net). There is a checkbox for "2-Factor Authentication" which is checked. At the bottom of the form, there are four buttons: "Data Integration" (highlighted with a red circle), "CC Config Setting", "Cancel", and "Save".

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



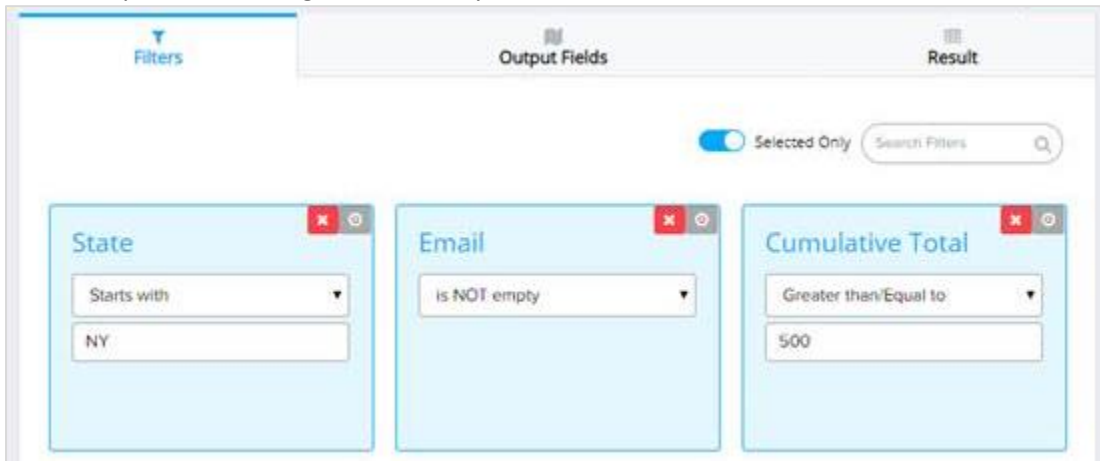
5. Log into the selected platform.

The image shows a web interface for connecting two accounts. At the top, there is a red square with the word "crimson" in white lowercase letters. To its right are two horizontal arrows pointing in opposite directions (one right, one left). Further right is the Mailchimp monkey head logo. Below this header, the text "Connect Crimson_Staging to your account" is centered, with "Crimson staging environment" centered underneath it. Below the text are two input fields: the first is labeled "Username" and the second is labeled "Password". At the bottom left of the form is a dark gray button with the text "Log In" in white.

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

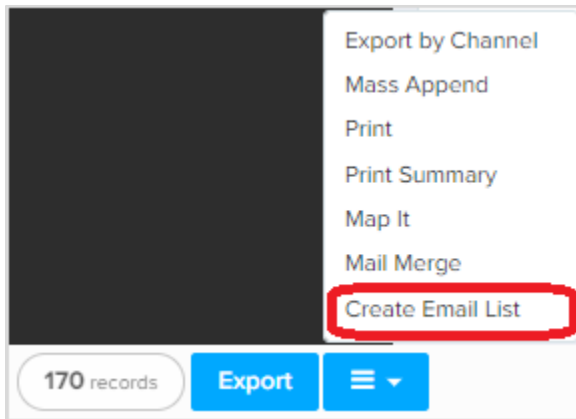
How to Upload a List

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



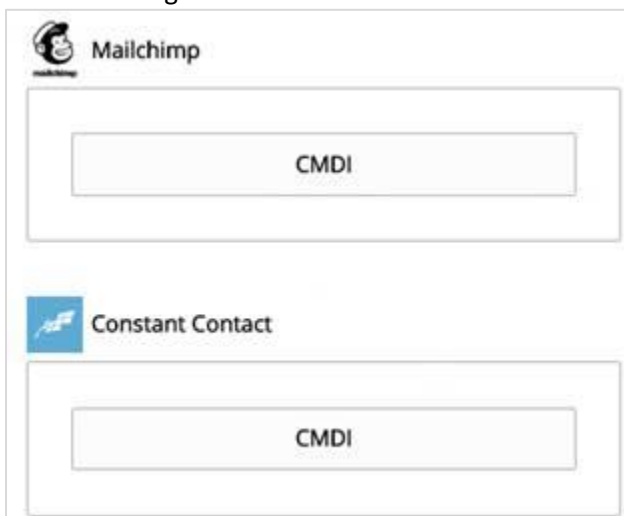
The screenshot shows a search interface with three filter panels. The first panel, titled "State", has a dropdown menu set to "Starts with" and a text input field containing "NY". The second panel, titled "Email", has a dropdown menu set to "is NOT empty". The third panel, titled "Cumulative Total", has a dropdown menu set to "Greater than/Equal to" and a text input field containing "500". Above the panels, there is a "Selected Only" toggle switch and a "Search Filters" search bar.

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



The screenshot shows a dropdown menu with the following options: "Export by Channel", "Mass Append", "Print", "Print Summary", "Map It", "Mail Merge", and "Create Email List". The "Create Email List" option is highlighted with a red rectangle. Below the menu, there is a button labeled "170 records", an "Export" button, and a menu icon.

3. Select an integrated Email Platform.



The screenshot shows two email platform options. The first option is "Mailchimp", with a "CMDI" button below it. The second option is "Constant Contact", with a "CMDI" button below it.

4. Create the new List.

Add Email List

List Name
New Email List

Update Type
Periodic: Run this search at regular intervals and send updated records

Update Interval
0 Days 12 Hours 0 Minutes


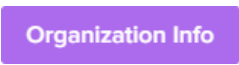

Custom Fields
Formal Salutation x Street x City x State x Select Custom Fields

- o Enter the preferred **List name**
 - o 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).
 - o 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.

- Select the enabled email platform integration for review.
- Click the "Email Lists" button under the correct account to view a list of "Periodic" syncing lists established.

Edit Integration for CMDI

Account Name

CMDI

✕ Delete
✉ Email Lists
Cancel
Submit

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

\$500+ New York Donors

Update Interval: 12 hours

Last Update: 1/30/20, 7:12 AM

✕
✎

- Click Updates to see the list of updates made to existing lists.

Email Lists for CMDI

Periodic Lists Updates

List Type Status

Hide Filters

	List	Type	Status	Started	Completed	Records	Last Log
☑	Agg:#ofGiftGreathanEquato2	Periodic	Succeeded	7/22/20, 5:14:11 PM	7/22/20, 5:14:35 PM	2	0 workers failed. Successfully processed 2 of 2 records.
☑	Agg:#ofGiftGreathanEquato2	Periodic	Succeeded	7/13/20, 5:11:14 PM	7/13/20, 5:11:38 PM	1	0 workers failed. Successfully processed 1 of 1 records.
☑	Agg:#ofGiftGreathanEquato2	Periodic	Succeeded	7/7/20, 5:10:36 PM	7/7/20, 5:10:59 PM	1	0 workers failed. Successfully processed 1 of 1 records.
☑	Agg:#ofGiftGreathanEquato2	Periodic	Succeeded	7/1/20, 5:10:06 PM	7/1/20, 5:10:29 PM	1	0 workers failed. Successfully processed 1 of 1 records.
☑	Agg:#ofGiftGreathanEquato2	Periodic	Succeeded	6/30/20, 5:10:04 PM	6/30/20, 5:10:27 PM	2	0 workers failed. Successfully processed 2 of 2 records.

Items per page
1-5 of 16 items

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