

Vuture Integration with Intapp

EMAIL MARKETING

EMAIL FORMS

ACTIVITIES / PREFERENCES

RSVPS / SUBSCRIBE / UNSUBSCRIBE

Vuture integrates with the Intapp CRM to retrieve lists of contacts and send personalized emails, invitations and newsletters.

Vuture records and displays responses and activities in Vuture dashboards and reports as well as updating these activities against the contacts in the CRM. The lists are loaded via the Vuture Connector which offers a seamless, efficient connection between the client's CRM and the Vuture instance.

Email Marketing

Some of the features available to users of the integration:



Create New Contacts

Add a new contact to the CRM



Add contact to a marketing list

Add a contact who has submitted the form to an Event or Publication list



Email and Link Tracking

Record timestamps for emails sent, opened and links clicked in Vuture dashboards/reports and write back to the CRM as required



Write back to Contact Field core or custom fields

Update Contact core and/or custom fields in CRM



Sample Email Send

Allow a test email to be sent to any user to view subscriber email before bulk send, verifying that personalised emails will retrieve contact values from the CRM



Write back Campaign additional fields

Update Campaign additional fields in CRM



Personalise emails, landing pages and subject lines using CRM contact and additional/custom fields

Include CRM fields in personalised emails and landing pages



Filter lists that are pulled back from CRM to Marketing lists or a more complex filter

Send email to part of your marketing list by selecting certain field values *e.g. only send to those who have responded with "Accept"*



Select lists to send to in real-time from CRM

Use the contacts currently in the CRM Marketing list at the time of sending



View as Contact (Test Email/page)

Use data direct from CRM to show how a personalised email will be viewed

Email Forms

Some of the features available to users of the integration:



Queue based real-time CRM integration for Form submission data

Write back data is queued, so if the CRM connection is down any calls are retried a set number of times and if it continues to fail, retried once again, 24 hours later, before being logged as an error



Add/Remove from Event/Mailing Lists

Contacts are added and removed from CRM Lists according to their subscription preferences



Pre-Fill forms

Fields from CRM are automatically shown when the form displays, saving time for your contacts and preserving the integrity of your data



Forward to a friend

Create a form to forward to a friend and link them to the same Event List if they submit the form



Insert CRM and Vuture fields into the same form

Customise forms to include a mixture of Vuture defined fields (Vx) and CRM fields



Global unsubscribe

Add contacts to unsubscribe lists to prevent sending all Emails, Marketing Emails or Event Invitations



Manage unsubscribes through CRM Lists/Custom fields

Control of unsubscribing contacts using contact fields



Invitee Event Fields

As well as writing back and updating new or existing contact data Vuture can write back any objects and fields. Example fields could be something like Accommodation, AIM Dinner, AIM Meeting, Dietary Requirements, Event Attendance etc

Activities / Preferences

Activities will be configured by the Vuture Project Manager in Vuture's Metadata Tool, following the configuration document completed by the client.

The following activity types are supported:

Email Activities

- Email Sent
- Email Opened
- Link Clicked
- Email Unsubscribed
- Email Bounced

The following information is recorded by other means:

Events

Event activities such as RSVPs and Attendance are handled by fields on the Invitee object.

Preferences

Contact Preferences are recorded under Areas of Interest

Areas of Interest

Areas of Interest are associated with a Contact record. Intapp manages adding/removing Contacts to an Area of Interest by associating them to "Areas of Interest Lists".

Contacts must be added to a List (as a List Member) and then to a Event or a Mailing. There are suppression rules in place to prevent adding certain Contacts based on Do Not Email.



Automated Actions and their Triggers

Automation saves time, speeds up processes and helps ensure nothing is forgotten or overlooked.

Here are some examples of automation available with the Intapp integration:

- Send email to list -by date, recurring trigger and link clicked
- Send email to matches -by date, links clicked and not clicked, form submitted and not submitted
- Send to recipients by date, recurring trigger and links clicked
- Update field by form submitted, not submitted, email opened, not opened, link clicked and not clicked
- Add to list -by email opened

RSVPs / Subscribe / Unsubscribes

In the CRM the objects in Intapp can be as follows:



Campaign

List of Invitees
(Delegates)



Mailings

List Subscribers
(Contacts)



Event

Event RSVPs
(Linked to
Contact)

As an example for the above objects you can have fields such Dietary Requirements or Event Attendance.

These can be written back using the same values defined for them in the Intapp CRM: PickList, MultiPickList, Text, Boolean, Date/Time, Integer, Currency, Percentage

SUPPRESSION FIELDS

There are 4 possible categories of suppression for Intapp:

1

Global Unsubscribes

Marking a contact as Global Unsubscribe in the CRM will prevent Vuture from sending any mailings to that contact.

2

Email Type Suppressions

These allow contacts to unsubscribe themselves from types of mailings, such as Events or Mailings, or a division of Mailings such as Alerts or Newsletters.

3

Undelivered

Vuture automatically processes bounced (undelivered) emails on a scheduled basis, recording this against the contact. When a contact hard bounces two times in a row, we will suppress that contact. When a contact soft bounces five times in a row, we will suppress that contact.

4

Consent

Once you add the Express Consent field to a form, your contacts will be able to tick the checkbox and either agree or disagree to be contacted by your organisation. This acts as a suppression if they disagree.

Any Questions? Please contact explore@vutu.re