

Evalanche

Integration for professional marketing automation





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1 Introduction

With its integration of CAS genesisWorld and the Marketing Automation Software Evalanche, the **Evalanche** module offers professional, web-based e-mail marketing using existing and qualified addresses from CAS genesisWorld.

The CAS genesisWorld database is used to send e-mail campaigns so that all departments across the company always use the same address data. For this purpose, the CAS genesisWorld addresses are grouped using distribution lists which are then transferred to Evalanche. In Evalanche, the corresponding address data from the CAS genesisWorld distribution list are then available as profiles.

At the same time, you can use a dedicated target group to define which profiles you want to synchronize back to CAS genesisWorld or create newly in CAS genesisWorld. In the process, information on, for example, scorings, tracking, and permissions is transferred to CAS genesisWorld.

As soon as all desired address data is available in Evalanche, you can create e-mail campaigns in various formats, personalize them, and send them to selected target groups, all without needing programming skills.

After sending, information on incorrect e-mail addresses and unsubscriptions are transmitted to CAS genesisWorld. The corresponding e-mail addresses are automatically marked as unsubscribed or blocked in the corresponding address data records.

Sent e-mail campaigns are also taken into account during synchronization, created as document data records in CAS genesisWorld, and automatically linked with the corresponding recipient addresses. In the respective document data records of the sent Evalanche e-mail campaigns, you can find a preview of the sent e-mail campaign as well as statistical data on the campaign, for example, the click behavior of the recipients.

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Your benefits at a glance

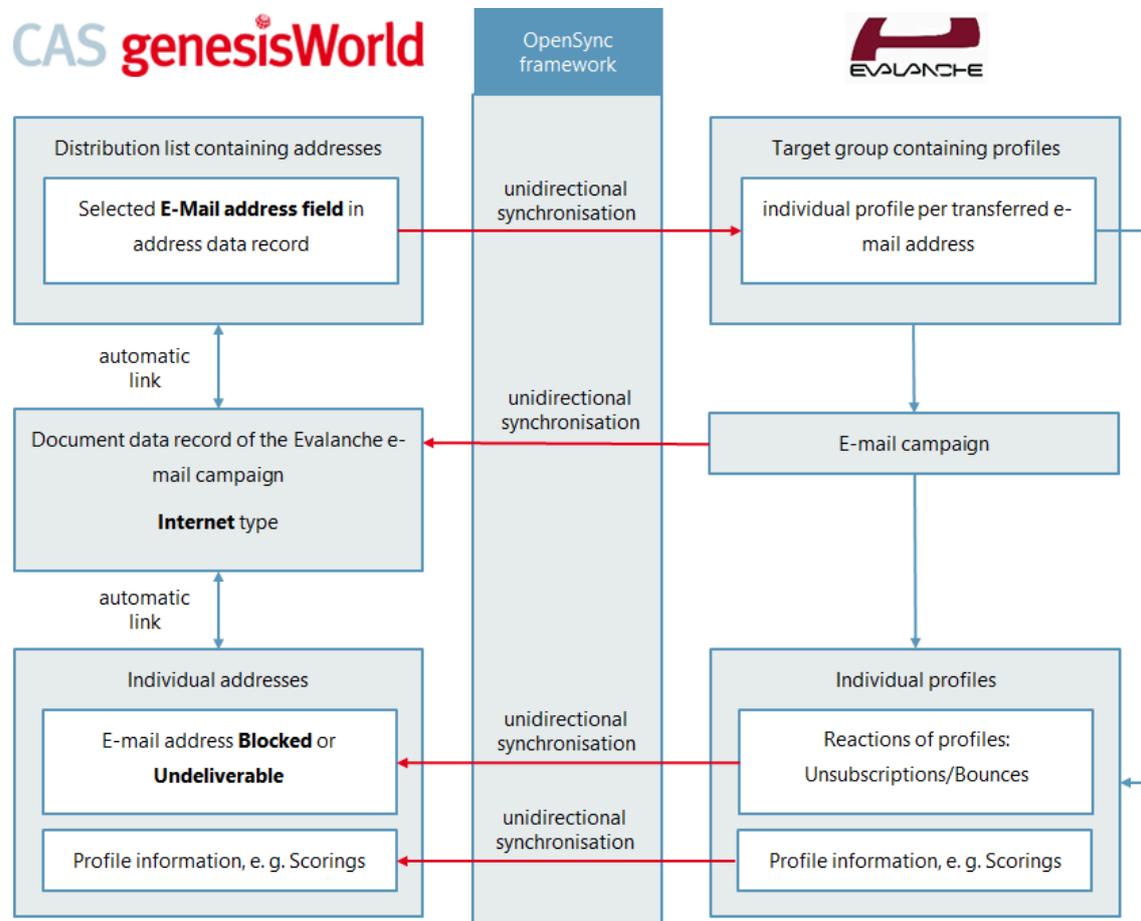
- Evalanche integration with all CAS genesisWorld clients: desktop client, CAS genesisWorld Web, and CAS genesisWorld SmartDesign Mobile App
- Synchronization of address data between Evalanche and CAS genesisWorld

- Web-based application without additional software installation
- Easily create HTML e-mails without programming knowledge
- Marketing campaign automation in Evalanche
- Possibility of content personalization
- Automatically check content and structure before sending out the e-mail campaign to ensure the best outcome.
- Profit from high sending rates without putting too much load on the CAS genesisWorld Application Server
- Monitor success with statistical, cross-medial, and geographical analyses and live tracking
- Managing e-mail bounces

Note

The documentation of the integration of CAS genesisWorld and Evalanche only describes the respective functions in CAS genesisWorld and direct interfaces to Evalanche. The functions of Evalanche will not be described in detail in this document. For further information, please contact SC-Networks GmbH or consult the Evalanche documentation.

1.1 Process and workflow



Selecting and synchronizing addresses

You select the desired recipient addresses in CAS genesisWorld using a distribution list of the **Evalanche** type. For this purpose, you add all addresses you want to target with your e-mail campaign to the distribution list.

As soon as a distribution list becomes **Active**, a new target group is created in Evalanche. In this new target group, the addresses that have been transferred from the distribution list are available as profiles.

Note

The **E-mail address field** you have selected as the recipient address must be filled in and unique in each address.

Creating and sending e-mail campaigns

Composing contents for an e-mail campaign, testing, and sending all takes place in Evalanche.

Unsubscriptions and bounces

As soon as an e-mail campaign has been sent to the desired target group, information on unsubscriptions and bounces is transmitted to CAS genesisWorld and displayed in the respective distribution list.

Incorrect e-mail addresses are automatically marked as **Undeliverable** in the address data record.

Unsubscriptions from individual distribution lists are registered and displayed on the **Address status** tab of the respective distribution list. If a recipient unsubscribes from all distribution lists, the respective e-mail address is automatically marked as **Blocked** in the corresponding address data record.

Note

You define in Evalanche whether unsubscriptions concern all or only individual distribution lists.

If a profile is deleted in Evalanche, the corresponding e-mail address is also marked as **Blocked** in the address data record. You can find more information in the following section "Deactivating or deleting distribution lists or addresses", page 36.

Evalanche e-mail campaigns in CAS genesisWorld

After sending, a document data record is created for each Evalanche e-mail campaigns that has been sent to the corresponding distribution list.

In this Evalanche e-mail campaign, you can find a preview and the corresponding analyses of the sent e-mail campaign.

The newly created document data records of the Evalanche e-mail campaigns are automatically linked with the corresponding recipient addresses as well as the distribution list in CAS genesisWorld. The sent e-mail campaigns are also displayed in a list view on the **Evalanche e-mail campaign** tab of the corresponding distribution list.

Tips

As data is resynchronized from Evalanche to CAS genesisWorld, some Evalanche e-mail campaigns that have not been sent to a distribution list in CAS genesisWorld are also created as document data records in CAS genesisWorld. You can find more information in the following section "Which data are synchronized", page 9.

Working with addresses in CAS genesisWorld

Depending on the settings of your synchronization task, information on specific Evalanche profiles is transmitted to CAS genesisWorld. In the process, existing addresses are enhanced and updated or new address data records are created.

After you have sent an Evalanche e-mail campaign, you can continue working with Evalanche profile information in CAS genesisWorld.

The corresponding addresses can then be sorted and filtered in views in CAS genesisWorld.

You can find more information in the following sections "Rules of resynchronization", page 12 and "Creating address views", page 26.

Note

If you want to learn more about which profiles are included in the resynchronization and, thereby, updated, enhanced or newly created in CAS genesisWorld, please contact your administrator.

Tips

Administrators can define automatic follow-up actions for changed addresses using the notification and action service. You can find more information in the following section "Setting up the notification and action service", page 49.

1.2 Which data are synchronized

During synchronization, various data is transmitted from CAS genesisWorld to Evalanche and back again.

From CAS genesisWorld to Evalanche

Addresses are grouped in distribution lists. The addresses from the distribution list are initially transmitted to Evalanche via unidirectional synchronization.

An address data record in CAS genesisWorld can contain multiple e-mail addresses. When an address is added to a distribution list, you define in the **E-mail address field** field which e-mail address from the address data record is transmitted to and created as a profile in Evalanche.

Thus, four different profiles can be created in Evalanche for each address. Only two of those possible profiles are displayed in profile slots in the address data record in CAS genesisWorld.

Note

If you want to know which e-mail addresses of an address data record are displayed in the two available profile slots, please contact your administrator.

If different e-mail addresses from one address data record are included in the synchronization, a unique profile is created for each e-mail address in Evalanche.

In the address data record, the **Profile**, **Original form**, **Permission**, **Profile Score**, **Activity Score**, **Profile analysis**, **Last update**, and **Last synchronization** fields of each assigned profile are automatically completed by the resynchronization from Evalanche to CAS genesisWorld. The corresponding fields cannot be edited in CAS genesisWorld.

From Evalanche to CAS genesisWorld

After sending, Evalanche transfers the following data to CAS genesisWorld.

Unsubscriptions	<p>Recipients of a mailing can unsubscribe from the mailing. Unsubscriptions are transmitted to CAS genesisWorld and the respective address is marked as Unsubscribed on the Address status tab of the distribution list.</p> <p>If a recipient has unsubscribed themselves from all distribution lists with a global deregistration, the recipient is marked as Blocked in the corresponding address data record. The Blocked mark can be found in the Contact data on the General tab of the address.</p> <p>If a profile is deleted in Evalanche, the corresponding e-mail address is also marked as Blocked in the address data record. You can find more information in the following section "Deactivating or deleting distribution lists or addresses", page 36.</p>
Hard bounces	<p>If e-mails have not been delivered due to incorrect e-mail addresses, those e-mail addresses are marked as Undeliverable in CAS genesisWorld.</p> <p>If an e-mail address has been marked as Undeliverable, it can no longer be used for an e-mail campaign. To be able to use the respective addresses again, the incorrect e-mail addresses must be corrected in the address data record.</p>

<p>Data on sent e-mail campaigns</p>	<p>In CAS genesisWorld, a document data record is created for each e-mail campaign that has been sent to profiles included in the synchronization set in Evalanche.</p> <p>The corresponding Evalanche e-mail campaigns are automatically linked with the respective recipient addresses in CAS genesisWorld.</p> <p>If the Evalanche e-mail campaign has been sent to a CAS genesisWorld distribution list, the data record of the distribution list is also linked with the e-mail campaign data record.</p> <p>You can access a preview of the e-mail campaign created in Evalanche and Evalanche analyses in the document data record.</p>
<p>Information from individual profiles</p>	<p>The administrator defines a dedicated target group in Evalanche. As soon as a profile is newly included in this dedicated target group, the corresponding profile becomes part of the synchronization set.</p> <p>If a profile does not yet exist in CAS genesisWorld, a new individual contact is created and completed with field values from Evalanche.</p> <p>If the e-mail address of a profile exists in an address data record in CAS genesisWorld, the corresponding data record is enriched with information from Evalanche. Thus, empty address fields in CAS genesisWorld are completed with values from Evalanche. However, existing values are not overwritten. Thereby, we can ensure that CAS genesisWorld remains the leading system.</p> <p>You can find more information on the resynchronization of profiles and profile slots in addresses in the following chapters: "Rules of resynchronization", page 12 and "Profile slots in CAS genesisWorld addresses", page 24.</p> <p>In the process, information on scorings, original forms, permissions, tracking permissions, and profile analyses are transferred to CAS genesisWorld.</p> <p>Once a profile is included in the synchronization set, it will always be included in the resynchronization even if they are no longer part of the dedicated target group.</p>

Note

Consent to the analysis of personalized data, for example, click-through rates, is given via Evalanche. In CAS genesisWorld, analyses can only be viewed and not edited.

If you want to learn more about which profiles are included in the resynchronization and, thereby, updated, enhanced or newly created in CAS genesisWorld, please contact your administrator.

The administrator can define that certain fields are always updated with values from Evalanche during resynchronization. If you want to know more about the fields that are always updated with values from Evalanche in your company, please contact your administrator.

If a profile is included in the synchronization set, the **synchronized with CAS genesisWorld** option is activated in the corresponding profile in Evalanche.

The documentation of the integration of CAS genesisWorld and Evalanche only describes the respective functions in CAS genesisWorld and direct interfaces to Evalanche. The functions of Evalanche will not be described in detail in this document. For further information, please contact SC-Networks GmbH or consult the Evalanche documentation.

1.3 Rules of resynchronization

As soon as a profile is included in the dedicated target group that has been defined by the administrator, the resynchronization from Evalanche to CAS genesisWorld is executed according to the following rules.

Check

The system checks whether the e-mail address of the profile already exists in an e-mail field of an address data record in CAS genesisWorld.

Depending on the results of the check, different scenarios can occur.

Scenario 1: the e-mail address does not yet exist

If the e-mail address of a profile cannot be found in any e-mail field of the address data records in CAS genesisWorld, a new individual contact is automatically created for the respective profile.

In addition to the fields that are already included in the synchronization set, the **Evalanche** value is automatically entered into the **First contact** field and the **E-mail** value is entered in the **Permitted contact method** field. Furthermore, the

date and time of the data record's creation in CAS genesisWorld is entered into the **First contact date** field.

Scenario 2: match in exactly one field

If the e-mail address of a profile can be found exactly once in the entire dataset in CAS genesisWorld, the profile is allocated to the corresponding address and empty address fields are potentially completed with values from Evalanche.

Note

The administrator can define that certain fields are always updated with values from Evalanche during resynchronization. If you want to know more about the fields that are always updated with values from Evalanche in your company, please contact your administrator.

Scenario 3: matches in multiple fields of the same address

If the e-mail address of a profile can be found in multiple fields in an address data record in CAS genesisWorld, the profile is allocated to one of the fields according to an order that has been defined by the administrator, for example, first to **E-mail (business)**, then to **E-mail (private)**, and so on.

Note

If you want to know more about the order of the automatic allocation in your company, please contact your administrator.

Scenario 4: matches in multiple fields of different addresses

If the e-mail address of a profile can be found in multiple fields in different addresses in CAS genesisWorld, another check is performed. The system now checks whether the different addresses contain the same values in the **Last name** field and whether the name is the same as in the Evalanche profile.

If the last name of the profile can be found in only one address, the profile is allocated to this address.

If the last name of the profile matches the last names of multiple addresses, the profile is allocated to the first found address.

Tips

If multiple addresses contain the same values in multiple fields, one of the addresses might be a duplicate. You can resolve duplicates using the CAS genesisWorld duplicate check.

When resolving duplicates, make sure you merge the values of both data records into the data record included in the synchronization set. Please contact your administrator for more information.

You can find more information in the online help for users on the following page: [Checking duplicates](#).

If the last name of the profile does not match any of the found addresses, the profile is also allocated to the first found address.

Scenario 5: profile duplicates in Evalanche

If multiple profiles contain the same e-mail address, the profiles are allocated to addresses in CAS genesisWorld in the order they are found and according to the set of rules described above. In the process, duplicates can be created in CAS genesisWorld, for example, if a new individual contact is created for one of the profiles in CAS genesisWorld.

You can use the CAS genesisWorld duplicate check to resolve those newly created duplicates.

1.4 Versions and licenses

The range of functions described in this user guide is available in conjunction with CAS genesisWorld as of version x12.2.3 or x13.1.3. You can find more detailed information on required and released versions as well as known restrictions in the current release notes at hilfe.cas.de.

The following requirements are necessary for the Evalanche integration.

- CAS genesisWorld license for the **Evalanche** module
- Access to an Evalanche tenant
- A stable internet connection

Tips

Users who are supposed to work with Evalanche must be given the corresponding right by the administrator. Please contact your administrator for more information.

2 Distribution lists in CAS genesisWorld

The first step in preparing an e-mail campaign in CAS genesisWorld is selecting the desired addresses and creating an Evalanche distribution list.

The **Distribution list status** is used to control the automatic synchronization of the distribution list to Evalanche.

The **Evalanche** tab is automatically added to a distribution list of the **Evalanche** type. On this tab, you can find information on the target group in Evalanche and select the **E-mail address field** you want to use.

Using the **Evalanche** drop-down list, you can access Evalanche directly from CAS genesisWorld or manually start a synchronization of the opened distribution list.

The **Evalanche e-mail campaigns** tab appears in the distribution list data record as soon as you have sent a mailing to the corresponding target group in Evalanche.

Note

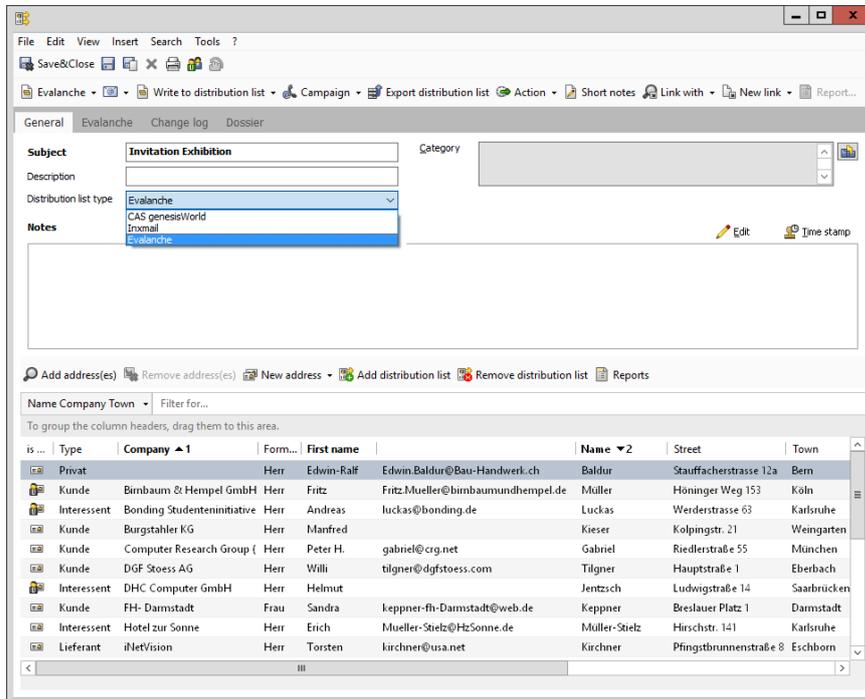
You create distribution lists of the **Evalanche** type in the CAS genesisWorld Desktop Client. In CAS genesisWorld Web, you can only read distribution lists of the **Evalanche** type, not edit them.

You can only select the **Evalanche** distribution list type if you have received the corresponding rights from the administrator. Please contact your administrator for more information.

Without the respective rights, you do not have access to the Evalanche-specific tabs.

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Creating Evalanche distribution lists and adding addresses

1. Click **New** and select the **Distribution list** data record type.



2. Using the toolbar functions, you can add or remove addresses.
3. Select the **Evalanche** value from the **Distribution list type** drop-down list.
- ✓ The **Evalanche** tab is added to the distribution list window. The **Evalanche** drop-down list is now displayed in the toolbar of the window.

2.1 Distribution list status

Using the **Distribution list status** field, you control whether a distribution list is transferred to Evalanche in the defined synchronization interval.

The **Distribution list status** field can contain the following values.

Status	Description
In preparation	In preparation is a distribution list that has not yet been transferred to Evalanche.

Status	Description
Active	Active indicates that the distribution list is in use and is transferred to Evalanche in the set interval.
Closed	<p>A distribution list is Closed if it is no longer in use and must not be edited. Closed distribution lists are no longer synchronized with Evalanche.</p> <p>Closed distribution lists can be reset to the Active status. However, you can no longer set the status to In preparation.</p> <p>Note</p> <p>If you close a distribution list in CAS genesisWorld, the target group in Evalanche remains. However, the corresponding profiles are removed from the target group and the target group can no longer be accessed via the CAS genesisWorld distribution list.</p>

2.2 Special fields on the General tab

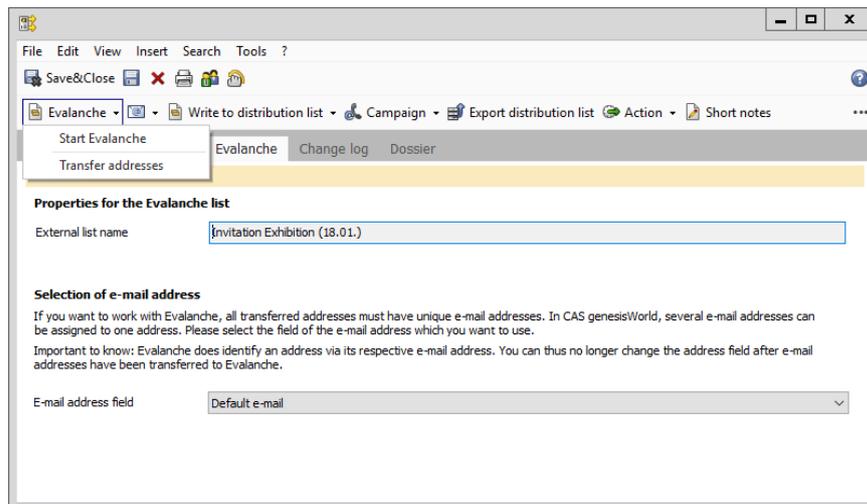
After the initial synchronization or the first use of the distribution list, the following fields are displayed on the **General** tab of the distribution list.

Field	Description
Last used	<p>In the Last used field, you can view when the distribution list was last used.</p> <p>The date and time of the last sent e-mail campaign in Evalanche is automatically entered into the field.</p> <p>If the distribution list has not yet been used, the field is not displayed.</p>

Field	Description
Last synchronization	In the Last synchronization field, you can view when the last synchronization with Evalanche has taken place. The date and time of the last synchronization is automatically entered into the field. Values are automatically entered with each synchronization whether the address data has been changed or remains the same. If the distribution list has not yet been synchronized, the field is not displayed.

2.3 Evalanche tab

The **Evalanche** tab is automatically added to a distribution list of the **Evalanche** type. On this tab, you can find information on the target group in Evalanche and select the **E-mail address field** you want to use.



External list name field

The **External list name** field displays the name of the target group in Evalanche. The name consists of the name of the CAS genesisWorld distribution list and the date of the first transfer to Evalanche.

Note

You cannot edit the **External list name** field. The field is automatically filled in after the first synchronization.

The **Subject** field on the **General** tab of the distribution list can still be edited. Thus, the name of the distribution list in CAS genesisWorld and the external list name can differ.

Selecting the e-mail address field

To send e-mails with Evalanche, exactly one e-mail address of the address must be selected. In CAS genesisWorld however, addresses can contain multiple e-mail addresses.

In the **E-mail address field** field, you thus select which field in CAS genesisWorld addresses is supposed to be used to create the profiles in Evalanche. This setting applies to all recipients of the distribution list.

Note

As soon as the addresses of the distribution list have been transferred to Evalanche, you can no longer change the **E-mail address field** field in CAS genesisWorld.

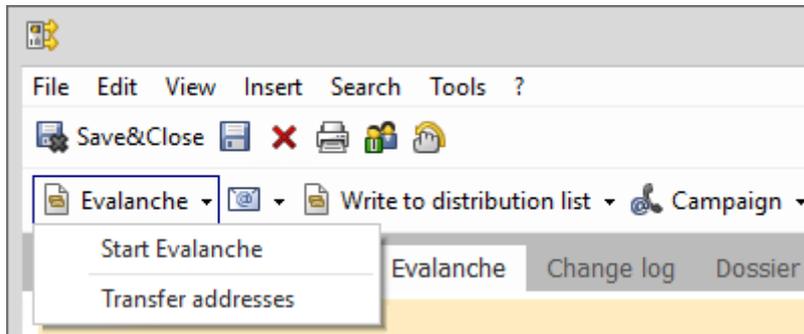
The e-mail addresses of all recipients have to conform to the RFC standard (Request for Comments). This standard determines the format of an e-mail address, for example, where the dots appear. If an e-mail address does not conform to the RFC standard, the e-mail address is not transmitted to Evalanche.

Moreover, Evalanche checks whether the domain of the e-mail addresses is valid. If an e-mail address contains an invalid domain, it is not transmitted to Evalanche.

Incorrect e-mail addresses which are not automatically transmitted are marked as **Undeliverable** in the respective address data record. You can find more information in the following section "Returns or bounces", page 31.

2.4 Evalanche drop-down list

Using the **Evalanche** drop-down list, you can access Evalanche directly from CAS genesisWorld or manually start a synchronization of the opened distribution list.



Start Evalanche

1. Click **Start Evalanche** to open the start page of your Evalanche account in a browser.
2. Log on using your Evalanche access data.

Transfer addresses

1. Click **Transfer addresses** to manually start a synchronization of the opened distribution list.
Transferring addresses to Evalanche may take a long time. A corresponding prompt opens.
2. Click **Yes** if you want to continue transferring the addresses.

Note

You can find more information in the following section "Transferring addresses", page 23.

2.5 Evalanche e-mail campaigns tab

The **Evalanche e-mail campaigns** tab appears in the distribution list data record as soon as you have sent a mailing to the corresponding target group in Evalanche.

On the **Evalanche e-mail campaigns** tab, you can see a list of all e-mail campaigns that have been sent to the distribution list. The corresponding document data records are linked with the distribution list. You can find more information in the following section "Evalanche e-mail campaigns in CAS genesis-World", page 30.

The list of sent e-mail campaigns is a document list and offers the usual functions for document lists in CAS genesisWorld. You can find more information in the

online help for users on the following pages: [Special functions for documents](#) and [Document list fields](#).

Double-click the desired Evalanche e-mail campaign to open the corresponding document data record in a new window.

Displaying a preview

To display a preview of a sent Evalanche e-mail campaign in the list of the sent mailings, you select the desired data record in the list. The preview is displayed in the lower part of the window.

2.6 Address status tab

On the **Address status** tab of the distribution list, you can see which addresses are marked with which status. The following status are displayed.

Status	Description
Recipient	All addresses that can be contacted via the distribution list and transferred to Evalanche are marked with the Recipient status.
Unsubscriptions	All addresses that have unsubscribed from the distribution list and must not be contacted are marked with the Unsubscribed status. You can find more information in the following section "Subscriptions", page 33.
Blocked	All addresses that have unsubscribed from all CAS genesisWorld distribution lists via a global unsubscription and must not be contacted using any distribution list are marked with the Blocked status. You can find more information in the following section "Subscriptions", page 33. If a profile is deleted in Evalanche, the corresponding e-mail address is also marked as Blocked in the address data record. You can find more information in the following section "Deactivating or deleting distribution lists or addresses", page 36.

Status	Description
Undeliverable	All addresses that have been identified as hard bounces after sending an e-mail campaign in Evalanche are marked with the Undeliverable status. Furthermore, all addresses that have not been transferred to Evalanche due to incorrect e-mail addresses are marked as Undeliverable . You can find more information in the following section "Returns or bounces", page 31.

Displaying addresses with certain status

1. Open the **Address status** tab in the desired distribution list.
 2. Select the desired status from the drop-down list in the upper left area of the window.
- ✓ Only addresses with the selected status are displayed in the list.

Time of subscription or unsubscription

In the address list, you can view when the respective recipient has subscribed to or unsubscribed from the distribution list.

In the **Subscribed on** column, the date and time of subscription are displayed.

In the **Unsubscribed on** column, the date and time of unsubscription are displayed.

3 Addresses in CAS genesisWorld

In CAS genesisWorld, you can use the available standard functions to work with addresses. You can find more information in the [Online help for users](#) or the [CAS genesisWorld Web online help](#).

Furthermore, you can access other functions to transfer addresses to Evalanche, correct incorrect e-mail addresses in address data records, or access profile analyses in Evalanche directly from CAS genesisWorld.

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3.1 Transferring addresses

The addresses of a distribution list in CAS genesisWorld are included in the synchronization and transferred to Evalanche if the status of the distribution list has been set to **Active**. As soon as the status of the distribution list is set to **Active**, the data record is automatically saved.

With this transfer, profiles and a target group are created in Evalanche. The profiles in Evalanche correspond to the individual e-mail addresses of the address data records that have been added to the distribution list in CAS genesisWorld.

When the next automatic synchronization takes place is defined by the set synchronization interval in the Management Console. Please contact your administrator for more information.

If you want to transfer the distribution list or changes to the distribution list to Evalanche before the next synchronization, you can manually start a synchronization for the desired distribution list. You can find more information in the following section "Evalanche drop-down list", page 19.

Multiple address transfers do not result in duplicate recipient profiles in Evalanche.

When transferring a distribution list to Evalanche, the addresses are checked in CAS genesisWorld. If the check finds errors, you can correct the corresponding addresses. You can find more information in the following section "Correcting addresses", page 25.

Note

Changes to profiles in Evalanche are taken into account during resynchronization if the respective profiles are included in the synchronization set. Changes to target groups are never taken into account during resynchronization. You can find more information in the following section "Rules of resynchronization", page 12.

Addresses are not transferred to Evalanche if the e-mail address is designated **Undeliverable** or **Blocked**. You can find more information in the following sections "Returns or bounces", page 31 and "Subscriptions", page 33.

3.2 Profile slots in CAS genesisWorld addresses

As soon as a profile is included in the synchronization set and, thus, taken into account during resynchronization, specific profile data are transferred to CAS genesisWorld.

Up to four Evalanche profiles can be allocated to an address in CAS genesisWorld. Only two of the four possible profiles are displayed in profile slots in the address data record in CAS genesisWorld.

Profile slots are visible to all CAS genesisWorld users even if they have not been granted **Other rights** for the **Evalanche** module.

The display of the profile slots varies in the different CAS genesisWorld clients.

Note

The administrator defines which Evalanche fields are taken into account during resynchronization and with which CAS genesisWorld fields the respective data is synchronized. The administrator also defines if and which Evalanche data is updated with each synchronization run. Please contact your administrator for more information.

If you want to know which e-mail addresses of an address data record are displayed in the two available profile slots, please contact your administrator.

Profile slots in the desktop client

In the desktop client, the **Evalanche** tab is added to the addresses included in the synchronization set. On this tab, the available profile slots that have been allocated to the address are displayed.

Profile slots in CAS genesisWorld Web and the CAS genesisWorld SmartDesign Mobile App

In the SmartDesign clients of CAS genesisWorld, the available profiles slots of the contacts included in the synchronization set are displayed as individual blocks in the contact data record. Each profile slot is displayed in a block as soon as a profile has been allocated to the contact.

Tips

You can open the respective profile analyses that are displayed in the profile slots directly from within the address or contact data record. You can find more information in the following section "Opening profile analyses from within CAS genesisWorld".

3.3 Correcting addresses

When transferring a distribution list to Evalanche, the addresses are checked in CAS genesisWorld. If the check reveals errors, a corresponding window opens.

Name of the window	Description
Missing e-mail addresses	The window opens containing a list of those addresses that do not contain an e-mail address in the selected E-Mail address field .
Duplicate e-mail addresses	The window opens containing a list of addresses that have the same e-mail address in the selected E-mail address field . If multiple address data records contain the same e-mail address, only one of the addresses is transferred and only one profile is created in Evalanche.
Invalid e-mail addresses	The window opens containing a list of addresses that are incorrect or do not conform to the RFC standard (Request for Comments).
Unsubscribed e-mail addresses	The window opens containing a list of addresses that have unsubscribed from all distribution lists or only the respective distribution list. You can find more information in the following section "Subscriptions", page 33.

Available buttons

In the lists of the different windows, you can access various buttons and functions.

Button	Description
Open	With this button, you open the desired address data record and make the necessary changes to the corresponding e-mail address.
Reload	With this button, you recheck whether the addresses contain missing, duplicate, or undeliverable e-mail addresses.
Continue	With this button, you continue the address transfer without editing the displayed e-mail addresses. Unsubscribed recipients and incorrect or missing e-mail addresses are not transmitted to Evalanche. Those recipients whose e-mail addresses are found in more than one address are only transferred once.
Delete	With this button, you delete the selected recipient from the distribution list. You can find more information in the following section "Deactivating or deleting distribution lists or addresses", page 36.

3.4 Creating address views

In CAS genesisWorld, you can filter and sort addresses using views, for example, to keep an overview of all addresses that have been newly created by the resynchronization from Evalanche.

Creating views in the desktop client

If you have the necessary rights, you can create new views for yourself in the desktop client. The respective views are only visible to the user who created them.

You can find more information in the online help for users on the following page: [Views](#).

Tips

Views can be exported and provided to other users for import.

Administrators can create public navigators that contain predefined views.

Please contact your administrator for more information.

Exemplary procedure

1. Open the File menu and click **New > View**.
2. Select the **List view** view type and click **Next**.
3. Select the **Addresses** template and click **Next**.
4. Define a name for the view and click **Next**, for example, **New addresses**.
5. Select the desired view format and click **Next**.

You can find more information on view formats in the online help for users on the following page: [View format tab](#).

6. If required, select a classification field and click **Next**, for example, **Last synchronization**.
7. Define a dynamic filter for the view and click **Next**.

Example

For example, if you want to display all addresses whose last synchronization occurred within the last week, you define the following filter.

8. Select the desired participants and resources and click **Finish**.
- ✓ The view has been created and displays all addresses that correspond with the defined filter.

Creating views in CAS genesisWorld Web

When you create views in CAS genesisWorld Web, they are also available in CAS genesisWorld Web and the CAS genesisWorld SmartDesign Mobile App.

You can find more information in the CAS genesisWorld Web online help on the following page: [Adjusting views](#).

Exemplary procedure

1. Open a **Contacts** app.
2.  Click the button to create a new view.
3. Click **Create list**.
4. Enter a view **Name** and click **Save**.
- ✓ The view has been created and is now opened.
5.  click **Filter** and define the desired filter.
For this purpose, you follow the same procedure as in the desktop client.
6. Click **Apply**.
- ✓ The view displays all contacts that correspond with the defined filter.

3.5 Opening profile analyses from within CAS genesisWorld

You can open the individual profile analyses directly from within the address in CAS genesisWorld.

Procedure

1. Open the address to which the respective profile has been allocated.
2. In the CAS genesisWorld Desktop Client, you open the **Evalanche** tab and open the URL in the **Profile analysis** field of the desired profile slot in your browser.
In CAS genesisWorld Web, you click the **Evalanche profile details** link in the **Profile analysis** field in the block of the profile whose analyses you want to open.
- ✓ Evalanche opens and the analyses of the selected profile are displayed.

4 Sending e-mail campaigns

Note

After the addresses have been transferred, you can compose and send an e-mail campaign in Evalanche. You can find more information in the following section "Transferring addresses", page 23.

The documentation of the integration of CAS genesisWorld and Evalanche only describes the respective functions in CAS genesisWorld and direct interfaces to Evalanche. The functions of Evalanche will not be described in detail in this document. For further information, please contact SC-Networks GmbH or consult the Evalanche documentation.

To send e-mail campaigns, you open Evalanche in your browser or using the **Evalanche** drop-down list in a distribution list data record. You can find more information in the following section "Evalanche drop-down list".

5 After sending

After you have sent an e-mail campaign in Evalanche, information on the sent e-mail campaign, bounces, as well as subscriptions and unsubscriptions are transferred to CAS genesisWorld.

Tips

CAS genesisWorld synchronizes data with Evalanche at regular time intervals set by your administrator. The address synchronization occurs unidirectionally.

Topics in this chapter

5.1	Evalanche e-mail campaigns in CAS genesisWorld.....	30
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5.1 Evalanche e-mail campaigns in CAS genesisWorld

After you have sent an e-mail campaign with Evalanche, the corresponding e-mail campaign, including a preview and analyses, is archived as a document data record of the **Internet** type in CAS genesisWorld.

All Evalanche e-mail campaigns that have been sent to the profiles included in the synchronization set are taken into account by the synchronization.

The individual document data records of the Evalanche e-mail campaigns are automatically linked with all recipient addresses as long as the respective e-mail addresses exist in the CAS genesisWorld database. If an e-mail campaign has been sent to the target group of a CAS genesisWorld distribution list, the document data record of the e-mail campaign is also automatically linked with the corresponding distribution list.

The **Subject** field of the newly created document is automatically completed with the subject line of the e-mail campaign you have created and sent in Evalanche. The name and ID of the corresponding Evalanche target group are automatically entered into the **Tags** field of the document data record.

Preview

In the **Notes** field on the **General** tab of the document data record, a preview of the sent e-mail campaign is displayed.

Note

The deletion of profiles in Evalanche and newly sent e-mail campaigns are only taken into account during the synchronization between Evalanche and CAS genesisWorld at night. The document data records of sent e-mail campaigns or the **Blocked** marker in address might, therefore, only be visible in CAS genesisWorld the following day. Please contact your administrator for more information.

The **Notes** field can still be edited.

We recommend you refrain from editing the field to prevent inconsistent data in CAS genesisWorld and Evalanche.

In the preview, the pictures of the e-mail campaign are only stored as URL references. Those pictures might not be displayed if the respective pictures are not available online at the time of access.

Analyses

On the **Web preview** tab, you see the analyses of the e-mail campaign provided by Evalanche.

To access the analyses, you must log on using your Evalanche access data. Users without an Evalanche account cannot access analyses.

E-mail campaign analyses are only created in Evalanche.

On the **General** tab of the document data record, you can click a button to start Evalanche and open the e-mail campaign analyses in your browser.

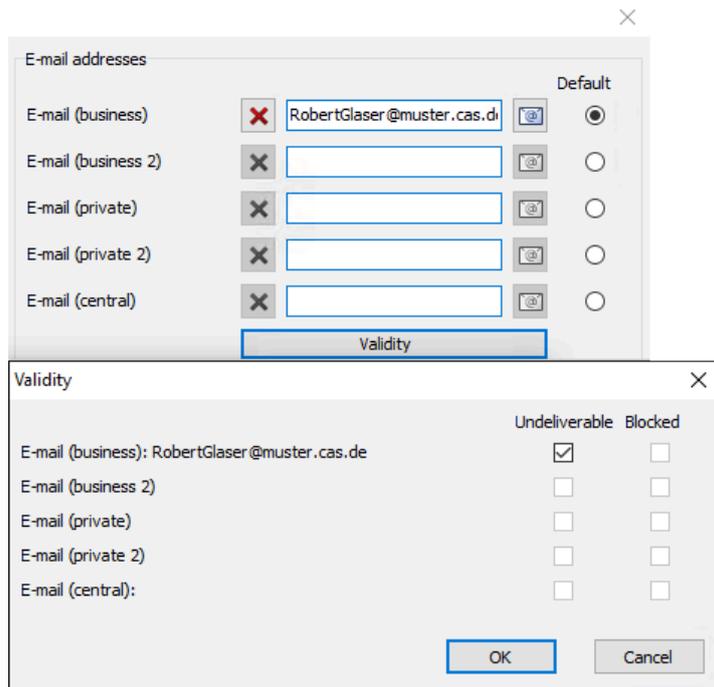
Accessing analyses via the General tab

1. Open the desired document data record.
2. Open the **General** tab.
3.  Click the button to start Evalanche on the page of the respective analysis.

5.2 Returns or bounces

Returns (bounces) are e-mails which have been returned to the sender because of incorrect e-mail addresses or other errors.

Information in bounces is transferred from Evalanche to CAS genesisWorld. The incorrect e-mail addresses are marked as **Undeliverable** in the address data record.



On the **Address status** tab of the distribution list, you can see which e-mail addresses are incorrect and need to be corrected.

Addresses in a distribution list which are marked as **Undeliverable** in CAS genesis-World are not transferred to Evalanche.

Furthermore, the **Undeliverable** e-mail addresses are marked as bounces in all distribution lists that contain the respective e-mail address of the address data record. You can display all e-mail addresses contained in the distribution list that have been marked as **Undeliverable** on the **Address status** tab. You can find more information in the following section "Address status tab", page 21.

You correct e-mail addresses in the corresponding address data record. After you have corrected the e-mail address, the **Undeliverable** option is automatically deactivated in the respective address.

Note

You cannot deactivate the **Undeliverable** option manually.

Only hard bounces are marked as **Undeliverable**. Hard bounces occur if, for example, an e-mail address is incorrect or does not exist, the corresponding domain does not exist, or the e-mail server of the recipient blocks delivery of the mailing. So-called soft bounces are not marked as **Undeliverable**, for example, if a mailing cannot be delivered because the inbox is full. The identification of hard-bounce profiles occurs in Evalanche. This process may take some time.

Please note that e-mail addresses are marked as **Undeliverable** in the address data record. The mark does not relate and is not linked to the distribution list data record.

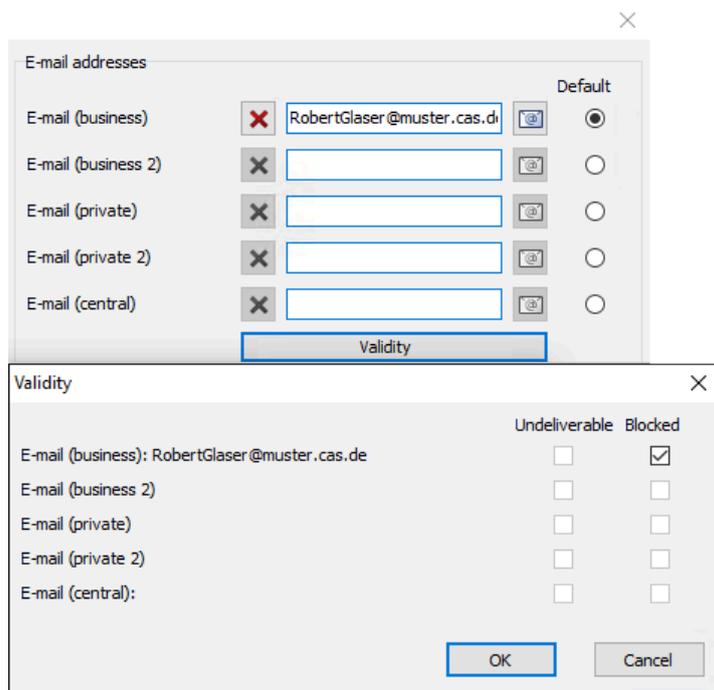
Correcting e-mail addresses

1. Click **Contact data** in an opened address data record.
2. Click the **Validity** button in the **Edit contact data** window.
- ✓ A window opens in which you can see if the **Undeliverable** option is activated for one or more e-mail addresses.
3. Correct the e-mail address or addresses that have been marked as undeliverable in the **Edit contact data** window.
- ✓ The **Undeliverable** option is automatically deactivated and the corrected e-mail address can be used for e-mail campaigns again.

5.3 Subscriptions

E-mail recipients can unsubscribe from newsletters in Evalanche. Unsubscriptions in Evalanche are transmitted to CAS genesisWorld and the corresponding address is marked as **Unsubscribed** on the **Address status** tab of the distribution list.

Global unsubscriptions are also transmitted to CAS genesisWorld, and the e-mail address used in the distribution list is automatically marked as **Blocked** in the corresponding address data record.



Subscriptions to a distribution list in Evalanche are not automatically transmitted to CAS genesisWorld. You register subscriptions to a CAS genesisWorld distribution list of the **Evalanche** type via CAS genesisWorld. The process can depend on the individual processes of your company.

Tips

In compliance with the GDPR (General Data Protection Regulation), we recommend you use a double-opt-in process for the subscription to distribution lists in CAS genesisWorld. Recipients must explicitly confirm each subscription by clicking a confirmation link in a double-opt-in confirmation mailing.

Information on unsubscriptions is transmitted from Evalanche to CAS genesisWorld if the target group in Evalanche has been created using a CAS genesisWorld distribution list.

If an e-mail address is marked as **Blocked** in an address data record, the corresponding e-mail address is no longer taken into account during synchronization. No profile is created in Evalanche.

You can view all subscriptions and unsubscriptions on the **Address status** tab of the respective distribution list. You can find more information in the following section "Address status tab", page 21.

Note

Unsubscribing from a distribution list prevents the e-mail address from receiving e-mails from the respective distribution list again. However, this unsubscription has no effect on all the other distribution lists. If, for example, an e-mail address was unsubscribed from a distribution list and a new distribution list is created containing this e-mail address, the same e-mail address will be written to again.

If someone requests that you no longer write to their e-mail address and they no longer wish to remain subscribed to any of the distribution lists, the respective e-mail address must be unsubscribed from all distribution lists via a global unsubscription. The e-mail address will only be marked as **Blocked** and no longer transferred to Evalanche after a global unsubscription.

You define in Evalanche whether unsubscriptions concern all or only individual distribution lists.

However, other e-mail addresses within the same data record can still be contacted. Unsubscriptions or global unsubscriptions always refer to the specific e-mail address and not to the address data record.

Blocking addresses manually

1. Click **Contact data** in an opened address data record.
2. Click the **Validity** button in the **Edit contact data** window.
- ✓ A window opens in which you can see whether the **Blocked** option has been activated for one or several e-mail addresses.
3. Activate the **Blocked** option.
- ✓ The respective e-mail address is blocked as a recipient of any mailings from CAS genesisWorld distribution lists.

6 Deactivating or deleting distribution lists or addresses

In CAS genesisWorld, deleting Evalanche distribution lists or addresses that are included in distribution lists works the same as when working with usual distribution lists or addresses.

Deactivating or blocking addresses

If you deactivate an address in CAS genesisWorld, all corresponding profiles in Evalanche are marked as **Unsubscribed**.

If you manually mark an e-mail address as **Blocked** in an address data record, the corresponding Evalanche profile is also marked as **Unsubscribed**.

Deleting addresses in CAS genesisWorld

The addresses that are included in the Evalanche synchronization set can be deleted in CAS genesisWorld.

If an address is deleted in CAS genesisWorld, the **Permission** field of all corresponding Evalanche profiles is set to **Unconfirmed**. The corresponding profiles can then no longer be contacted via e-mail campaign. If required, you can manually reactivate the profiles in Evalanche. The history of the respective profiles is retained.

Note

If you restore an address you have deleted in CAS genesisWorld from the recycling bin and add it to a distribution list again, duplicates of the **Unconfirmed** profiles are created in Evalanche.

Deleting addresses in Evalanche

If you delete a profile in Evalanche, the corresponding e-mail address in the address data record in CAS genesisWorld is marked as **Blocked**.

If an e-mail address is marked as **Blocked** in an address data record, the corresponding e-mail address is no longer taken into account during synchronization. No profile is created in Evalanche.

You can find more information in the following section "Subscriptions", page 33.

Note

The deletion of profiles in Evalanche and newly sent e-mail campaigns are only taken into account during the synchronization between Evalanche and CAS genesisWorld at night. The document data records of sent e-mail campaigns or the **Blocked** marker in address might, therefore, only be visible in CAS genesisWorld the following day. Please contact your administrator for more information.

Closing distribution lists in CAS genesisWorld

If you close a distribution list in CAS genesisWorld, the target group in Evalanche remains. However, the corresponding profiles are removed from the target group and the target group can no longer be accessed via the CAS genesisWorld distribution list.

Procedure

1. Open the **General** tab of the desired distribution list.
 2. Select **Closed** in the **Distribution list status** drop-down list.
- ✓ Afterwards, the distribution list is no longer a target group. If you want to send the distribution list data to Evalanche again, reset the **Distribution list status** to **Active** in the distribution list data record. The distribution list status is automatically reset to **Active** if you click **Transfer addresses** in the **Evalanche** drop-down list.

Deleting distribution lists in CAS genesisWorld

If you delete a distribution list in CAS genesisWorld, the target group in Evalanche remains. However, the corresponding profiles are removed from the target group. The target group remains empty in Evalanche.

Deleting target groups in Evalanche

If a target group is deleted directly in Evalanche, the deletion has no effect in CAS genesisWorld. As the synchronization is unidirectional, the deleted target group is recreated with the next synchronization of the respective CAS genesisWorld distribution list.

Deleting the whole distribution list from both systems

You can delete any distribution list in CAS genesisWorld using the default functions independent of whether you want to delete an Evalanche distribution

list or not. Afterwards, the corresponding target group in Evalanche must be deleted manually.

Note

The documentation of the integration of CAS genesisWorld and Evalanche only describes the respective functions in CAS genesisWorld and direct interfaces to Evalanche. The functions of Evalanche will not be described in detail in this document. For further information, please contact SC-Networks GmbH or consult the Evalanche documentation.

7 Installation and setup

Before you start the installation and setup of CAS genesisWorld the Evalanche integration, you need to fulfill specific requirements on Evalanche-side. You can find more information in the following section "Checklist for setting up the interface", page 39.

As soon as the requirements are met on Evalanche-side, you can start installing and setting up the **Evalanche** module.

For this purpose, you first need to enter the corresponding license in the **Management Console** as well as start the **OpenSync** service in the **Server Manager** of the desired Application Server.

You can find more information on entering licenses and starting services in the following online help pages: [Licenses area](#) and [Services tab](#).

When starting the service, an entry is made into the database. Then, the **OpenSync** area can be opened in any Management Console that accesses the corresponding database.

Additionally, you need to grant certain rights to those CAS genesisWorld users who are supposed to use the module functions in your company.

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7.1 Checklist for setting up the interface

Using the checklist for setting up the interface between Evalanche und CAS genesisWorld, you can ensure that you have made all necessary preparations and fulfilled all requirements.

Requirements before setting up the interface

The following requirements need to be fulfilled before you can start setting up the interface.

	Requirement
<input type="checkbox"/>	<p>The Reporting API is activated in Evalanche and the Evalanche user that is to be used has been granted the Reporting API right.</p> <p>Note</p> <p>The Reporting API needs to be manually activated for the Evalanche account by SC-Networks GmbH. Then, you can assign user and role rights for the Reporting API to the user you want to use for the synchronization on the Systems tab of the Evalanche interface. If required, the user and role rights need to be granted globally for the account by the customer/administrator. Please contact SC-Networks GmbH for more information.</p>
<input type="checkbox"/>	<p>The Evalanche user you want to use for the setup of the synchronization task has at least the following rights on the System tab.</p> <ul style="list-style-type: none"> ■ Login ■ View profile list ■ Import profiles ■ Export profiles ■ Delete profiles ■ Scoring ■ Evaluate Scoring ■ Web services 2.0 ■ Reporting API
<input type="checkbox"/>	<p>The Evalanche user you want to use for the setup of the synchronization task has at least the following rights on the Objects tab.</p> <ul style="list-style-type: none"> ■ Send eMailing: display, manage ■ Target group: display, manage, create ■ Pool: display, change
<input type="checkbox"/>	<p>(Optional) You have defined which target group is supposed to be used for resynchronization.</p>
<input type="checkbox"/>	<p>(Optional) You have defined workflows for how profiles become part of the selected target group.</p>

Installation and setup steps in CAS genesisWorld

	Requirement
<input type="checkbox"/>	The license for the Evalanche module has been entered in the Management Console .
<input type="checkbox"/>	<p>You have set up a synchronization task. You can find more information in the following section "Synchronization tasks", page 41. In the process, the following settings have been defined an entered.</p> <ul style="list-style-type: none"> ■ User name and password of the Evalanche user that is used for the synchronization ■ Evalanche pool ID ■ Evalanche tenant ID ■ Target group ID for the resynchronization from Evalanche ■ (Optional) Order of the matching priority for e-mail addresses in CAS genesisWorld ■ Database instance ■ Day as of which the sent e-mail campaigns are to be synchronized
<input type="checkbox"/>	All users who are supposed to use Evalanche have been granted the Address transfer to Evalanche right by the administrator. You can find more information in the following section "User rights in CAS genesis-World", page 49.

7.2 Synchronization tasks

As soon as the license has been activated and the **OpenSync** service has been started successfully, the **OpenSync** area is displayed in the Management Console. You can now create a new synchronization task.

When you open the **OpenSync** area in the Management Console, you see an overview of all existing synchronization tasks.

You create new synchronization tasks using the synchronization wizard.

You can save a new synchronization task in the synchronization wizard at any time. Even if you have not yet completed the setup of a synchronization task, your entries remain and you can continue configuring the synchronization task at a later time.

Note

If you use more than one Application Server, the **OpenSync** service must only be started on one of the Application Servers.

With the Evalanche license, you can only set up a connection to Evalanche in the **OpenSync** area. If you want to set up further connections, contact your CAS Partner or CAS Software AG.

The initial synchronization can take longer depending on the number of addresses that need to be transferred.

The deletion of profiles in Evalanche and newly sent e-mail campaigns are only taken into account during a full synchronization run between Evalanche and CAS genesisWorld. A full synchronization occurs maximum once a day between 1-4 a.m. as long as a synchronization task is active. A full synchronization run is also triggered if:

- You create a new synchronization task
- You edit an existing synchronization task
- The last full synchronization was more than 7 days ago

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7.2.4 Managing synchronization tasks.....	46

Icons in the header area

Icon	Description
	Click the button to create a new synchronization task.
	With this button, you return to the overview of all synchronization tasks.

7.2.1 System selection area

In the **System selection** area, you define the systems you want to connect.

Note

The fields in the **System to be connected** and **CAS genesisWorld** blocks are automatically completed if you have an **Evalanche** license. If you have an **OpenSync** license, you might need to enter values yourself.

Procedure

1. Enter the name of the new synchronization task in the **Subject** field.
Choose a unique name to be able to easily and quickly identify the Evalanche synchronization task even if several synchronization tasks for different systems have been set up in the **OpenSync** area.
2. Select **Evalanche** in the **System** field if you have an **OpenSync** license.
3. Select the **CAS genesisWorld EvalancheSync ConnectionBridge** in the **ConnectionBridge** drop-down list in the **CAS genesisWorld** block.

7.2.2 Connection area

In the **Connection** area, you set up the connection between both systems.

Evalanche block

In the **Evalanche** block, you enter the Evalanche access data as well as information on the used pool, tenant, and database instance. Additionally, you enter the Target group ID for resynchronization here.

Procedure

1. Enter your **User name** and **Password** for Evalanche.
2. Enter the **Pool ID** of the Evalanche pool you want to use.
The pool ID of the desired pool can be found in Evalanche when you open the respective pool.
3. Enter the **Tenant ID** of the Evalanche tenant you want to use.
The tenant ID of the desired Evalanche tenant can be found in the Evalanche settings under **Account**.
4. Enter the desired Evalanche instance in the **Database instance** field.
The entered database instance must comply with one of the following schemes: **scnem2.com**, **https://scnem2.com**, **http://scnem2.com**.
Which database instance you enter depends on your Evalanche configuration.
5. Enter the **Target group ID for resynchronization**.
You can define any target group as the dedicated target group for resynchronization.

Note

You can change the **Target group ID for resynchronization** retroactively. The profiles contained in the previously selected target group will remain in the synchronization set and must be removed manually if required.

You can find more information on how to create a target group for resynchronization in the corresponding Evalanche documentation:

[Evalanche help center: Create target group](#).

6. In the **Synchronize e-mail campaigns as of the following day** field, you define as of which date sent Evalanche e-mail campaigns are taken into account during resynchronization and, thus, created as document data records in CAS genesisWorld.

CAS genesisWorld block

In the **CAS genesisWorld** block, you see with which database the system to be connected is synchronized. The database to which you have logged on with the Management Console is automatically entered in the Database field.

If the name of the database has been changed with the Database Wizard, existing synchronization tasks can no longer be executed. In this case, you must open the

desired synchronization task for editing and select the new name of the database from the **Database** drop-down list.

You can find more information in the following section "Managing synchronization tasks", page 46.

Furthermore, you define the matching priority of e-mail fields in addresses here. The priority defines in which order Evalanche profiles are assigned to addresses in CAS genesisWorld if an e-mail address is found in multiple fields of different addresses.

Note

We recommend defining the matching priority according to which e-mail fields you want to use most in CAS genesisWorld.

The defined matching priority also controls which e-mail address of a data record is entered into the available profiles slots of an address.

If you retroactively change the order of matching priorities, you trigger a full resynchronization of the data set. In the process, the two available profile slots are filled according to the newly defined order in all addresses included in the synchronization set.

You can find more information in the following section "Rules of resynchronization", page 12.

Procedure

1. Select the desired **Database** from the respective drop-down list.
2. Select the desired e-mail fields in address data records in the desired order in the **1. Matching priority for e-mail fields** to **4. Matching priority for e-mail fields** fields.

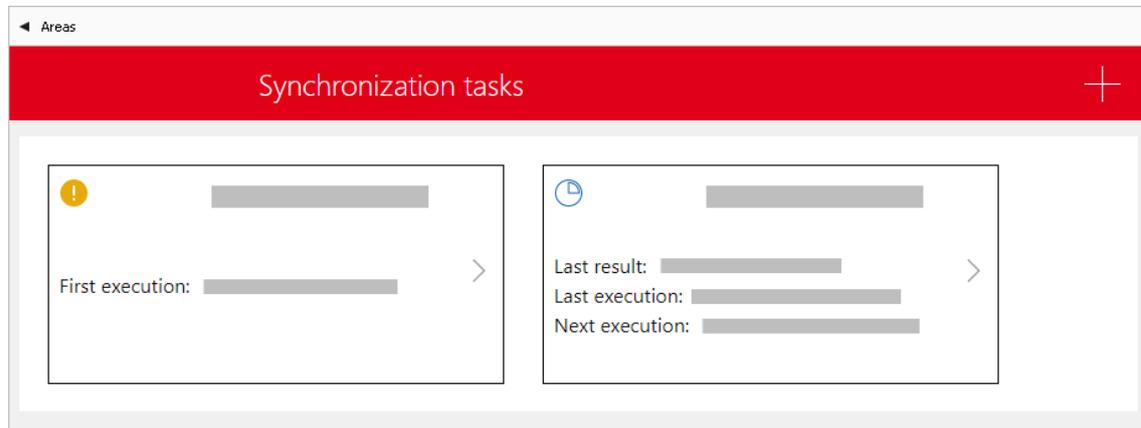
7.2.3 Execution area

In the **Execution** area, you define the synchronization interval for the synchronization task.

1. In the **Execution plan** drop-down list, select whether the synchronization is **Continuous**, happens at an **Interval**, or at a specific time as **Daily execution**.
2. Select the **Time unit** that is to be used for the synchronization.
You can choose between **Hours** and **Minutes**.
3. Select the desired value from the **Interval** drop-down list.
Which values can be selected in the drop-down list depends on the time unit you selected.

7.2.4 Managing synchronization tasks

In the overview of all existing synchronization tasks, you manage your synchronization tasks.



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Synchronization task icons

Icon	Description
	This icon marks synchronisation tasks which have never been executed in the overview.
	Executions are marked with Synchronization running if the synchronization is currently running.
	Executions with a Successful synchronization are marked with this icon.
	Executions are marked with this icon in case of a Failed synchronization .

Opening the detailed overview

If you click a synchronization task in the synchronization task overview, you open the detailed overview of the selected synchronization task.

Icons in the header area

Icon	Description
	Click the Back button to return to the last opened page.
	With this button, you return to the overview of all synchronization tasks.
	Click the Edit button to open the synchronization wizard in the System selection area and edit the desired synchronization task.
	<p>Click the Delete button to delete the desired synchronization task.</p> <p>Note</p> <p>If you delete a synchronization task, all metadata referring to the corresponding task are also deleted. As a result, if you create a new synchronization task, the task is identified as new and all data in the synchronization set are synchronized. There is no duplicate check during this synchronization and duplicates may be created.</p>
	<p>Click the button to manually start the synchronization task.</p> <p>Tips</p> <p>You can also start each synchronization task manually. It does not matter whether the synchronization task is active at the time.</p> <p>If the synchronization task is active, the manual synchronization is automatically queued in the list of executions.</p>

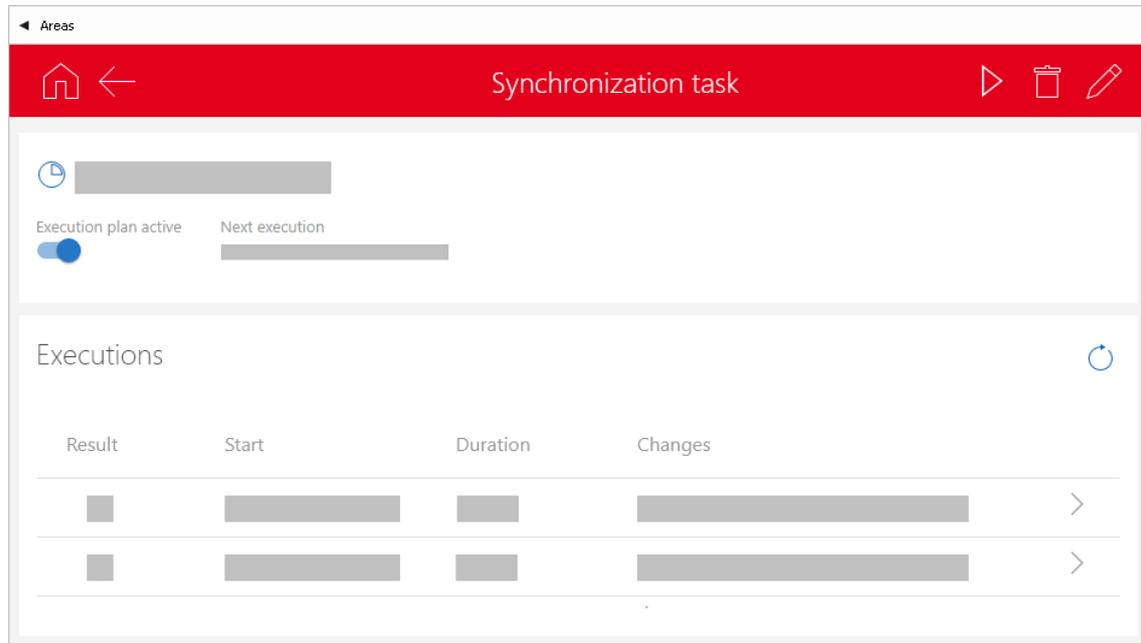
Execution plan active option

If the synchronization task is active, you see the time of the next planned execution in the upper area of the detailed overview.

If you deactivate the **Execution plan active** option, the synchronization task is no longer active and is no longer synchronized at the set interval.

Executions in the detailed overview

Under **Executions**, you find a protocol of the last synchronization task executions. The list is updated automatically, but can be updated manually as well.



Opening or updating executions

- Click an execution to open the corresponding protocol containing detailed information on the execution.
-  Click the button to update the list of executions.

Displayed information

In the list, you will see:

- The result of the last execution
- The starting time of the next synchronization
- The history of all completed synchronizations
- The status of the running synchronization

Synchronization task icons

Icon	Description
	This icon marks synchronisation tasks which have never been executed in the overview.
	Executions are marked with Synchronization running if the synchronization is currently running.

Icon	Description
	Executions with a Successful synchronization are marked with this icon.
	Executions are marked with this icon in case of a Failed synchronization .

7.3 User rights in CAS genesisWorld

Users who are supposed to use Evalanche need to be granted the specific right **Address transfer to Evalanche** by the administrator in the Management Console.

Users without respective rights can only see that the distribution list type is set to **Evalanche**. Those users cannot see the respective additional tabs in the distribution list or use other functions.

Users without Evalanche rights can open the data records of sent Evalanche mailings. The respective users can see the mailing preview and open the **Analysis** tab.

Note

To see the analyses of the Evalanche mailing, users must have Evalanche access data at their disposal.

Assigning Evalanche rights

1. Open the **Management Console**.
 2. Open the **User Management** area.
 3. Open the **Properties** window of the respective user or users.
 4. Activate the **Address transfer to Evalanche** option on the **Other rights** tab.
- ✓ The selected user or users have the necessary rights to use all functions of the **Evalanche** module.

7.4 Setting up the notification and action service

Using the notification and action service, administrators can define rules that automate specific processes in your company. A rule determines which events automatically trigger which actions.

Using those rules, you can, for example, define that a new follow-up task is created as soon as an address contains a specific value in the **Profile score** field filled in by the resynchronization from Evalanche.

Exemplary procedure

1. Open the **Management Console**.
 2. Open the **Rules** area.
 3. Select the **Rules for notifications and actions** folder.
 4.  Click **New**.
 5. Enter a **Name** and a **Description** of the rule.
 6. Select the **Data record type** you want to monitor.
 7. Activate the **All** option.
 8. Select **Data record change** as the **Event type**.
 9. Activate the **Changing data record** option and then the **Specific change of a field value** option.
 10.  Click the **Settings** button next to the **Specific change of field value** option.
 11. Select the **Profile score** field from the **Field name** drop-down list.
 12. Select **greater or equal** as the condition.
 13. Enter the desired scoring value and click **OK**.
 14. Select the desired **Monitoring interval**.
 15. Click the **Enter computer name of the application server** button.
 16. Open the **Action** tab.
 17. Select **New data record** from the **Action** drop-down list.
 18. Select **Task** from the **Data record type** drop-down list.
 19. Select the desired **Participants** for the task that is to be newly created, for example, your sales team.
 20. If required, predefine **Field values**, for example, **Follow-up** as **Subject** value.
 21. Activate the **Link new data record with activating data record** option and select **General link** as the **Link type**.
 22. Click **OK**.
- ✓ The rule is created. As soon as an address in CAS genesisWorld contains at least the defined value in the **Profile score** field, a new task is created and linked with the respective address. The task contains the participants and field values defined by the rule.

7.5 Defining fields to be updated

As the administrator, you can define which fields of the profile slots in address data records in CAS genesisWorld are always updated by the resynchronization from Evalanche.

For this purpose, you enter the database names of the desired fields into the **address-fieldsToAlwaysUpdate.txt** TXT file. You can find this file in the **\$SERVER/JavaServices/opensync/dropins/.internal/connectionbridge/evalanche/** folder on the computer on which you have installed the CAS genesisWorld Application Server.

Note

The **address-fieldsToAlwaysUpdate.txt** files is created by the first Evalanche synchronization run. If you accidentally delete the file, it is recreated by the next synchronization.

Procedure

1. Open the **\$SERVER/JavaServices/opensync/dropins/.internal/connectionbridge/evalanche/** folder.
 2. Open the **address-fieldsToAlwaysUpdate.txt** file.
 3. Enter the desired field. Use the physical name of the field in the CAS genesis-World database.
 4. Save the TXT file.
- ✓ The entered profile slot field is updated with Evalanche values by the resynchronization run as of the next synchronization.

7.6 Evalanche field mapping

In the following table, you can find the field mapping for addresses or profiles, the field mapping of the resynchronization of profiles from Evalanche to CAS genesis-World, as well as the field mapping of the synchronization of Evalanche e-mail campaigns.

The listed names are the physical names of the database fields. Administrators can look up the relevant translations for the field names in the Management Console of CAS genesisWorld.

Note

The **STREET**, **ZIP**, **TOWN**, **COUNTRY**, and **GWSTATE** fields are the respective fields of the **Default address**. The default address is used if you write, for example, a letter or form letter.

In Evalanche, the **EMAIL** field is synchronized with the CAS genesisWorld field that has been set as the **E-mail address field** in the distribution list. You can find more information in the following section "Evalanche tab", page 18.

During the resynchronization of profiles, the data from one profile is entered into the fields of only one of the available profiles slots, for example, EVFORMOFORIGIN1, EVTRACKING1, and so on.

Tips

Your CAS Partner can customize the Evalanche Field Mapping to suit your company requirements. You can find more information in the following section "Configurable Field Mapping", page 54.

Field mapping: addresses and profile slots**Addresses and Profiles**

Evalanche	CAS genesisWorld
SALUTATION	GWGENDER
FIRSTNAME	CHRISTIANNAME
NAME	NAME
EMAIL	MAILFIELDSTR1, MAILFIELDSTR2, MAILFIELDSTR3, MAILFIELDSTR4, MAILFIELDSTR5
COMPANY	COMPNAME
COMPANY2	COMPNAME2
ADDRESSLETTER	ADDRESSLETTER
ADDRESS STREETNUMBER	STREET
ZIPCODE	ZIP

Evalanche	CAS genesisWorld
CITY	TOWN
COUNTRY_GENESISWORLD	COUNTRY
STATE_GENESISWORLD	GWSTATE
CASGENESISWORLDGGUID	GGUID
EXTERNALID	GGUID and used e-mail field

Profile slots in addresses

Displayed field name	Evalanche	CAS genesisWorld
Source form	FORM	EVFORMOFORIGIN1 EVFORMOFORIGIN2
Tracking deactivated	TRACKING_DISABLED	EVTRACKING1 EVTRACKING2
Permission	PERMISSION	EVPERMISSION1 EVPERMISSION2
Profile score	Default scoring group: Profile score	EVPROFILESCORE1 EVPROFILESCORE2
Activity score	Default scoring group: Activity score	EVACTIVITYSCORE1 EVACTIVITYSCORE2
Profile analysis	URL of the corresponding profile analysis	EVPROFILEURL1 EVPROFILEURL2

Evalanche e-mail campaigns and document data records

Evalanche	CAS genesisWorld
Subject line of sent e-mail campaign	KEYWORD

Evalanche	CAS genesisWorld
Name of target group Target group ID	NOTES
Contents of sent e-mail campaign	NOTES2

7.7 Configurable Field Mapping

If necessary, you can customize the field mapping for the data exchange between Evalanche and CAS genesisWorld to fit your company requirements.

Note

Contact CAS Software AG or your CAS partner if you want to customize your field mapping.

Please note that with some specific constellations, multiple profiles in Evalanche can be synchronized with one address in CAS genesisWorld. If in such cases, you configure a bidirectional field synchronization, then it is possible that different fields in different profiles overwrite one another. Consequently, we recommend that you first test the customizations you want to implement in a test environment. This way, you can spot errors early and avoid data loss.

Topics in this chapter

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7.7.1 Fields that can be added

You can add almost all CAS genesisWorld fields to the mapping between Evalanche and CAS genesisWorld.

On the Evalanche side, you can include all fields, including any you created yourself, in the mapping process.

Note

For more information on Evalanche fields, please contact SC Networks GmbH or read the respective Evalanche documentation.

The following CAS genesisWorld fields are essential for synchronization and must not be added to the custom mapping.

- ADDRESS_GGUID_MAIL_ID
- GWGENDER
- MAILFIELD
- INXMAIL_BOUNCES
- BLOCKED_EMAILS

7.7.2 Mapping file

As of CAS genesisWorld version x11.1.14, the field mapping used for the data exchange between Evalanche and CAS genesisWorld is defined in the [evalanche_custom_mapping.xml](#) file.

This XML file is created automatically after the [OpenSync](#) service has been started.

You can find the [evalanche_custom_mapping.xml](#) file in the installation directory of the CAS genesisWorld server in the `..\JavaServices\opensync\dropins\mappings` subfolder

Restoring the original mapping file

If you have deleted the mapping file by mistake, or the mapping you configured does not work, then you can restore the original mapping file or create a new one.

You will have to edit the [migration.properties](#) Java Properties file to make sure that the mapping file is created.

Procedure

1. Open the [migration.properties](#) file in the installation directory of the CAS genesisWorld server in the `..\JavaServices\opensync\dropins\internal` subfolder.
2. Remove the following property from the file.

```
EvalancheCustomMappingMigrator.MIGRATION_DATE=[DATE]
```

3. Save the file.
 4. Restart the [OpenSync](#) service in the Server Manager.
- ✓ The mapping file is now recreated.

7.7.3 Customizing mapping files

The following describes user case scenarios which illustrate how you can customize mapping files. If you require further customization, then please contact CAS Software AG.

Note

The mapping file and all copies of the mapping file include an ID attribute. This ID attribute must not be changed. Please ensure that no more than one file including a corresponding ID attribute is available in the `..\JavaServices\opensync\dropins\mappings` folder.

You will need knowledge of XML to customize the mapping file. OpenSync-specific knowledge may be required if you wish to integrate field modelling into the mapping file.

Any mapping file customizations should be performed by your CAS partner.

Before customizing the mapping file, you should familiarize yourself with the synchronization workflow. This will ensure that you do not change any fields which are essential to the smooth running of the synchronization process.

If you customize a mapping file while the synchronization is already running, this will not have an effect on the current synchronization run. Changes will only apply as of the next synchronizations run. If data records have already been synchronized between both systems using a different mapping configuration, then the changes to the mapping will only apply to the respective data records with the next change made to the data record.

Create a copy of the mapping file in another folder to prevent the server from starting a synchronization with an incomplete mapping.

Copying, editing, and replacing mapping files

1. In another folder, create a copy of the existing `evalanche_custom_mapping.xml` mapping file.
You can rename the mapping file if you wish. Renaming is not mandatory.
 2. Open the mapping file you wish to edit.
 3. Edit the mapping file.
 4. Replace the existing mapping file `evalanche_custom_mapping.xml` with the mapping file you customized.
- ✓ Your individually configured field mapping will be used as of the next synchronization.

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Defining the direction of the mapping

You can define the direction of a new mapping, or change the direction of an existing mapping. If you are adding a new mapping, then you should insert the respective new rows in the `<mapping>` area.

The following examples show all possible directions.

Direction	Input
From CAS genesisWorld to Evalanche	<pre><fieldMapping direction="rightToLeft"></pre>
From Evalanche to CAS genesisWorld	<pre><fieldMapping direction="leftToRight"></pre>
Bidirectional	<pre><fieldMapping direction="both"></pre>

Adding fields to mappings

Before you can add new fields to the field mapping, you have to identify the database names for the fields.

In CAS genesisWorld, you can find the field names in the **Database** area of the Management Console. You can find more information on field names in the **Database** area in the online help for the Management Console on the following page: [Editing columns for data record types](#).

Procedure

1. Open the mapping file you wish to edit.
2. Insert a new row within the `<mapping>` area.
3. Define the direction of the mapping.

```
<fieldMapping direction="rightToLeft">
```

4. Insert additional rows under the directional information and define the mapping you wish to use.

```
<leftFields>
  <leftRecordField name="NAME_EVALANCHE_FIELD"/>
</leftFields>
```

```

<rightFields>
  <rightRecordField
name="NAME_GENESISWORLD_DATABASE_FIELD" />
</rightFields>
</fieldMapping>

```

5. Save the new mapping file.

Editing existing mappings

You can edit existing mappings so that, for example, another CAS genesisWorld field is synchronized with the respective fields in Evalanche.

Procedure

1. Open the mapping file you wish to edit.
2. Find the mapping you would like to customize.

```

<fieldMapping direction="rightToLeft">
  <leftFields>
    <leftRecordField name="NAME_EVALANCHE_FIELD"/>
  </leftFields>
  <rightFields>
    <rightRecordField
name="NAME_ORIGINAL_GENESISWORLD_DATABASE_FIELD" />
  </rightFields>
</fieldMapping>

```

3. Enter the name of the new field you want to use instead of the name of the field in the original mapping.

```

<fieldMapping direction="rightToLeft">
  <leftFields>
    <leftRecordField name="NAME_EVALANCHE_FIELD"/>
  </leftFields>
  <rightFields>
    <rightRecordField
name="NAME_DESIRED_GENESISWORLD_DATABASE_FIELD" />
  </rightFields>
</fieldMapping>

```

```
</rightFields>
</fieldMapping>
```

4. Save the new mapping file.

Transforming existing mappings

Note

We do not currently provide detailed instructions on the transformation of existing mappings. If you would like to transform an existing mapping, then please contact the Support Team at CAS Software AG.

Configuring profile slots

If you want, you can also add fields to the field mapping for the resynchronization of profiles from Evalanche.

For this purpose, you first create the desired Evalanche field in the CAS genesis-World database. You can also add your custom-created Evalanche field to the mapping.

As Evalanche profiles are resynchronized into one of two displayed profile slots in addresses, you need to create two new fields for each new Evalanche field in CAS genesisWorld.

Afterwards, you place the newly created fields at the desired location in the address or contact data record using the Form Designer or the App Designer.

As soon as the new fields have been created and placed in CAS genesisWorld, you can add the fields to the Evalanche field mapping.

Note

The following describes the procedure when creating new fields in CAS genesisWorld.

The documentation of the integration of CAS genesisWorld and Evalanche only describes the respective functions in CAS genesisWorld and direct interfaces to Evalanche. The functions of Evalanche will not be described in detail in this document. For further information, please contact SC-Networks GmbH or consult the Evalanche documentation.

Procedure

1. Open the **Management Console**.
2.  Open the **Database** area.
3. Select **Addresses** in the **Standard data record types** folder.

4.  Click **New column**.
5. Enter the name of the desired Evalanche field for profile slot 1 including the **EV** prefix into the **Name** field, for example, EVFAVORITEFOOD1.
6. If required, define a **Header** in one or multiple languages.
7. Click **OK**.
8.  Click **New column**.
9. Enter the name of the desired Evalanche field for profile slot 2 including the **EV** prefix into the **Name** field, for example, EVFAVORITEFOOD2.
10. If required, define a **Header** in one or multiple languages.
11. Click **OK**.

12. Place both new fields at the desired location in the **Addresses** or **Contacts** data record type.

You can find more information on placing fields in the desktop client or CAS genesisWorld Web in the online help of the Management Console or the App Designer on the following pages [Functions in the Form Designer area](#) or the [Online Help App Designer: App Designer](#)

13. Open the mapping file you wish to edit. You can find more information in the following section "Customizing mapping files", page 55.
14. Insert new rows in the **<mapping>** area and define the direction of the mapping as **leftToRight**.

```
<fieldMapping direction="leftToRight">
```

15. Enter the name of the field in Evalanche.

```
<leftFields>
<leftRecordFieldname="FAVORITEFOOD"/>
</leftFields>
```

16. Enter the name of the field in the respective profile slots without the profile slot number, but including the prefix **PROFILESLOT**.

```
<rightField>
<rightRecordFieldname="PROFILESLOT_EVFAVORITEFOOD"/>
</rightFields>
```

17. Save the new mapping file.

Configuring scoring groups

During the synchronization of scorings, the **Standard** Evalanche scoring groups are automatically used for profile and activity scores.

You can customize this setting by editing the scoring groups in the field mapping.

Furthermore, you can add new scoring values from other scoring groups to the field mapping.

Note

Please consider that you may need to create new database fields in CAS genesisWorld to add new scorings to the resynchronization. The procedure when creating new scoring fields in CAS genesisWorld is identical to the procedure when creating new fields in profile slots. You can find more information in the following section "Configuring profile slots", page 59.

Changing used scoring groups

1. Open the mapping file you wish to edit.

```
<fieldMapping direction="leftToRight">
  <leftFields>
    <leftRecordField
name="SCORINGGROUP_Standard_PROFILESCORE"/>
  </leftFields>
  <rightFields>
    <rightRecordField name="EVPROFILESCORE" />
  </rightFields>
</fieldMapping>
```

2. Change the names of the used scoring groups

```
<fieldMapping direction="leftToRight">
  <leftFields>
    <leftRecordField
name="SCORINGGROUP_MyScoring_PROFILESCORE"/>
  </leftFields>
  <rightFields>
    <rightRecordField name="EVPROFILESCORE" />
  </rightFields>
</fieldMapping>
```

```

    </rightFields>
  </fieldMapping>

```

3. Save the new mapping file.

Adding new scoring groups

1. Open the mapping file you wish to edit.
2. Insert new rows in the **<mapping>** area and define the direction of the mapping.

```

<fieldMapping direction="leftToRight">

```

3. Enter the name of the scoring group in Evalanche.

```

<leftFields>
  <leftRecordField
    name="SCORINGGROUP_MyExtraScoring_PROFILESCORE"/>
</leftFields>

```

4. Enter the name of the CAS genesisWorld field without the profile slot number.

```

<rightFields>
  <rightRecordField name="EVEXTRAPROFILESCORE" />
</rightFields>

```

5. Save the new mapping file.