How to Use Synchronization Alert Emails

Ever lose sleep over potential mapping errors? Did all of your survey/form response data make it into CRM? Will customer feedback fall into a black hole?

Worry no more! Clicktools enables you to immediately identify and resolve mapping errors with synchronization alert emails. All you need to do is configure scheduled alerts to your inbox. Every alert email provides a link to the synchronize control panel, so that you can quickly fix the error and correctly integrate responses with your CRM system.
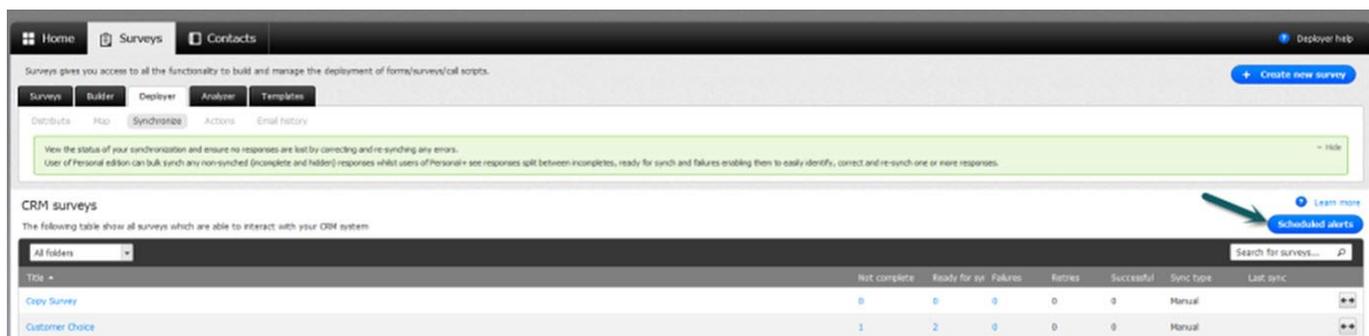
NOTE:
Sync Alerts are only available in:

- Team edition and above
- Automatically synchronized surveys

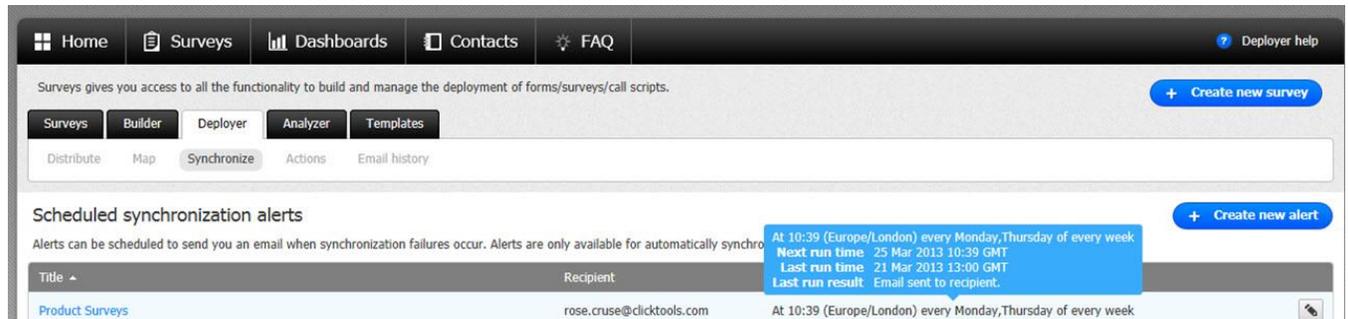**Let's look at how to set this up.**

Start on the homepage, under **Quick tasks**, and click **CRM synchronization**.
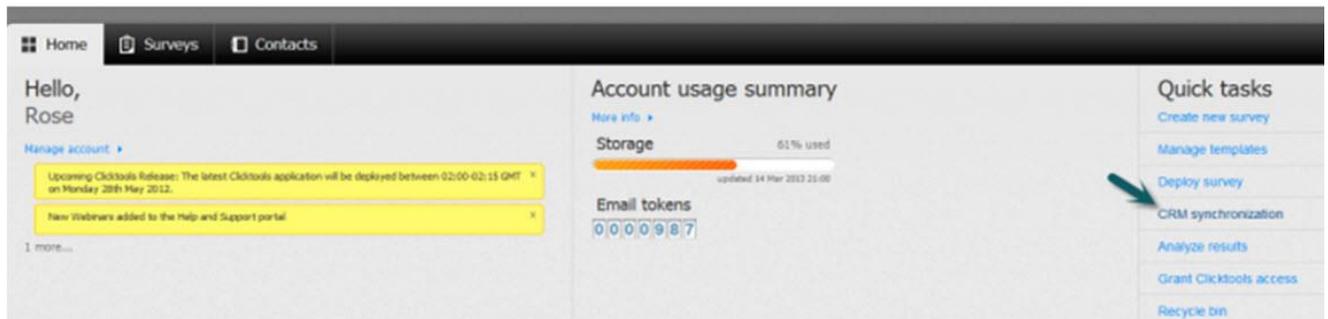
This option takes you to the Deployer, Synchronize page. Click the **Scheduled alerts** button located under the **learn more** link.

The Scheduled Synchronization alerts page displays.

This page lists all of your previously created alerts. From here, alerts may be created and edited.

Please note that deciding who should receive alerts (and how often) will depend on your volume of surveys, responses, and synchronizations. Initially, we suggest that you set up an alert to review all of your surveys and send a message to the Principal Clicktools user. Over time, you can determine the best person to receive alerts for specific surveys. Make sure that the person receiving the alerts is capable of performing the appropriate remedial action should a failure occur. Even though the error messages provide guidance on the correction, the user needs to have the access privileges to see the amends through.

Use the **+ Create new alert** button to build a new one and fill in the following info:

- **Title:** Name your alert so that it can be easily identified within a list of scheduled alerts.
- **Description:** Provide more information about this alert, such as why it was generated.
- **Recipient:** Select a verified organizational email address to receive the alert. Only one email address can be selected.

Now, identify which surveys you want to trigger alerts.

Survey: Surveys: ⦿ User selection ⦾ All surveys

When set to **User selection**, you'll choose from a complete list of surveys that you have permission to access. Select the surveys you want by moving them to the Selected list. You (or the chosen email recipient) will receive alerts for these surveys should any sync errors occur.

Surveys: ○ User selection   ● All surveys
The recipient is a Clicktools user. The alert will check all automatically synchronized surveys visible to the user.

When set to **All surveys**, alerts will be sent for every survey that the user defining the alert has permission to access.

Next, you must define how often you wish to receive alerts. The available settings are hourly, weekly, daily or monthly. Under each, a variety of different settings become available.

Frequency: [Monthly ▼]

Time: [10 ▼] [39 ▼]

Timezone: [(GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London ▼]

Date type: [Relative day ▼]

Day: [first ▼] [Monday ▼]

In which months:
☐ January   ☐ February   ☐ March
☐ April   ☐ May   ☐ June
☐ July   ☐ August   ☐ September
☐ October   ☐ November   ☐ December

Each Alert email provides a link back to the scheduled alert, so that you can change the frequency, email recipient, or even opt to delete the alert.

On the Scheduled synchronization alerts page for existing Alerts, you can hover over the schedule to see the specific frequency for this alert and its most recent activity.

That's it! Ready to go set up your alerts? Let us know if you need any help.

Be in touch. We're happy to answer any product or technical questions!
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