Email Integration checklist

Purpose of the document- To ensure all technical, data, and compliance requirements are in place for seamless integration between Orchestrate and the email platform. It helps verify readiness for audience targeting, creative setup, opt-in handling, tracking

1. Who is the email provider? Pick one?
   1. Iterable managed by EVersna
   2. Salesforce Marketing cloud Eversana instance managed by Eversana
   3. Salesforce Marketing cloud Eversana instance managed by Client or third party . List name of third party\_\_\_\_\_\_\_\_\_
   4. Epsilon
   5. Other. Please List \_\_\_\_\_\_\_\_\_\_
2. Which consent, compliance management application will be used?
   1. One Trust
   2. Other. Please list\_\_\_\_\_\_\_\_\_
3. Do you need time for IP warming?
   1. Yes
   2. No
   3. If you need time- how much time you need? Please list\_\_\_\_\_
4. how many emails you can send during IP warming?
5. Is there a specific data extension or file name you need ahead of building activation journeys on you end?
   1. Yes. please specify naming convention\_\_\_\_\_\_
   2. No
6. How much build time you need to write a journey in ESP platform?\_\_\_\_\_\_\_
7. What are the requirements or input you need to write a journey?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Please share any activation document if applicable.
2. Do you need to load user email address ahead of time?
   1. Yes. How much time\_\_\_\_\_\_\_\_\_\_\_\_\_
   2. No
3. How much time you need before the launch date is the FIA needed?\_\_\_\_\_\_\_\_
4. How often can you send PLD/Engagment data back ?
   1. Daily
   2. Weekly
   3. Monthly
5. How do you do Matching for Helath care provider? Via:
   1. Email address
   2. NPI
   3. Veeva ID
   4. Other unique Identifier. please list\_\_\_\_\_\_\_\_\_\_\_\_
6. How often can u send unsubscribes back?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   1. Can UNSUBSRIBE be include in PLD files?
7. Do you share Aggregated or Non- aggregated data ?
   1. Aggregated
   2. Non-Aggregated
8. Which platform you use for intake?
   1. S3
   2. SFTP
   3. API
9. Pleas share a sample PLD file.