

SETUP CHECKLIST

Connect2Clients® Email and Greeting Card Tool

To Create Personas:

- Scanned image of handwritten signature
(jpeg, png, gif, pdf; minimum 300 x 300 pixels. For best results, use a blue ballpoint pen.)
- Logo or headshot: Displays on emails and cards
(jpeg, png, gif, pdf; minimum 400 x 400 pixels)
➡ [Sample email template](#) ➡ [Sample card template](#)
- List of advisors (personas) using the account
(Name, ID, email address for up to 5 advisors at no additional cost)



To Upload Contacts:

- Not a Redtail CRM user:** Your contact list saved as .CSV file
(Can include columns for groups and tags)
➡ [Excel template](#) (Shows all fields available in tool)
The Help section within the Connect2Clients page on SmartWorks contains several guides pertaining to contact lists.
- Redtail CRM user:** Your username and password
(Only one Redtail account can be synced with multiple personas)

To Add Users:

- Identify advisors and support staff who require a unique login to the tool under the same account
(Name, ID, email address)

Other:

- Credit card
(For monthly subscription cost and any printed cards ordered)
- Header image for email template
(jpeg, png, gif, pdf; minimum 50 pixels high and must be exactly 675 pixels wide)
➡ [Sample header within email template](#)

Once subscribed to the Connect2Clients Email and Greeting Card tool, the Getting Started video and helpful links will walk you through setup. If you have any questions, please contact the Connect2Clients team at c2cmarketing@cetera.com.

[Book an Appointment](#) 