



CRM Link: Reynolds & Reynolds

Overview

CRM Data is a critical source of Data that the Fullpath CDXP utilizes across various marketing and sales solutions in order to connect and enhance interactions and customer engagements as well as populate the Fullpath Data Lake.

Connecting your CRM to the CDXP

Let your Implementation Manager know that Reynolds & Reynolds is your current CRM, Fullpath can take care of the rest! We'll reach out to Reynolds & Reynolds directly to set up an API that will pull your CRM data into the CDXP.

Permissions and Reports

Reynolds & Reynolds will provide Fullpath with your Leads and Sales data, along with any subsequent updates made to Leads data. This will be a daily feed, helping to ensure the data in your dashboard is regularly updated.

Please note, there are some limitations to the data provided by Reynolds & Reynolds. They will not provide Fullpath with more than 6 months of Lead data and no more than 5 years of Sales data. Lastly, Reynolds & Reynolds does not support Services.

Time to Completion

Reynolds & Reynolds requires Fullpath to fill out a request form and email it to their support team before any data is exchanged. Upon receipt of the form, the CRM may contact the customer to validate that Fullpath is permitted access to this data. As long as there aren't any delays, data should appear in the CDXP within 24 hours.