Copernica Connector CRM Beta

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Contents

1. Topic

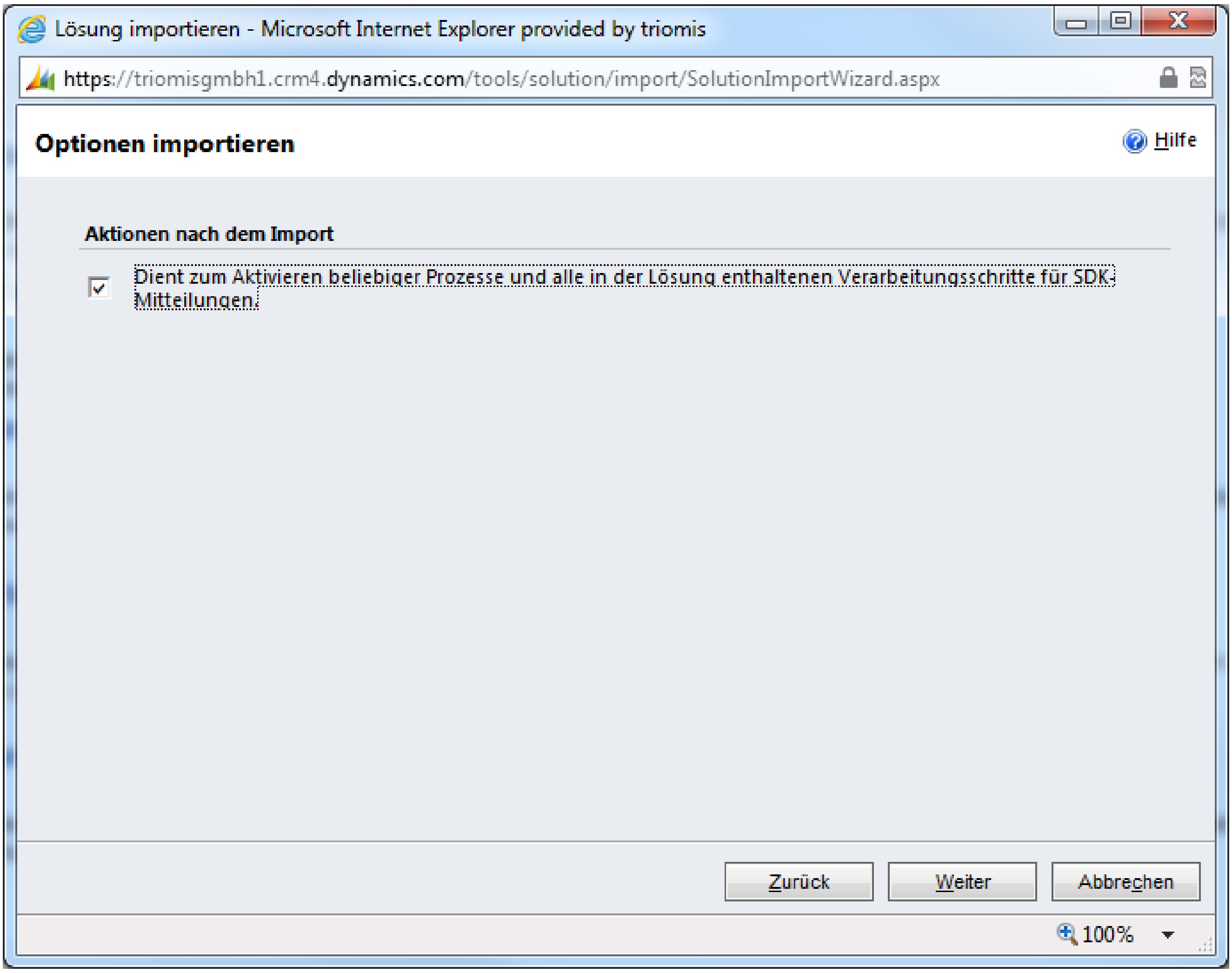
Thank you for your beta test triomis Copernica CRM Connector for CRM 2011. With this solution for CRM 2011, you can synchronize your contacts to Copernica and manage email campai from CRM.
As a beta tester, you can get the connector Copernica at no cost for a limited test period, but you must live with the fact that the application is not completely finished and maybe has some errors. Please report any bugs and suggestions, preferably with screenshots and error logs from CRM to info@triomis.de.
To operate the Copernica connector you need a Coperncia account and of course CRM 2011.

2. Chapters

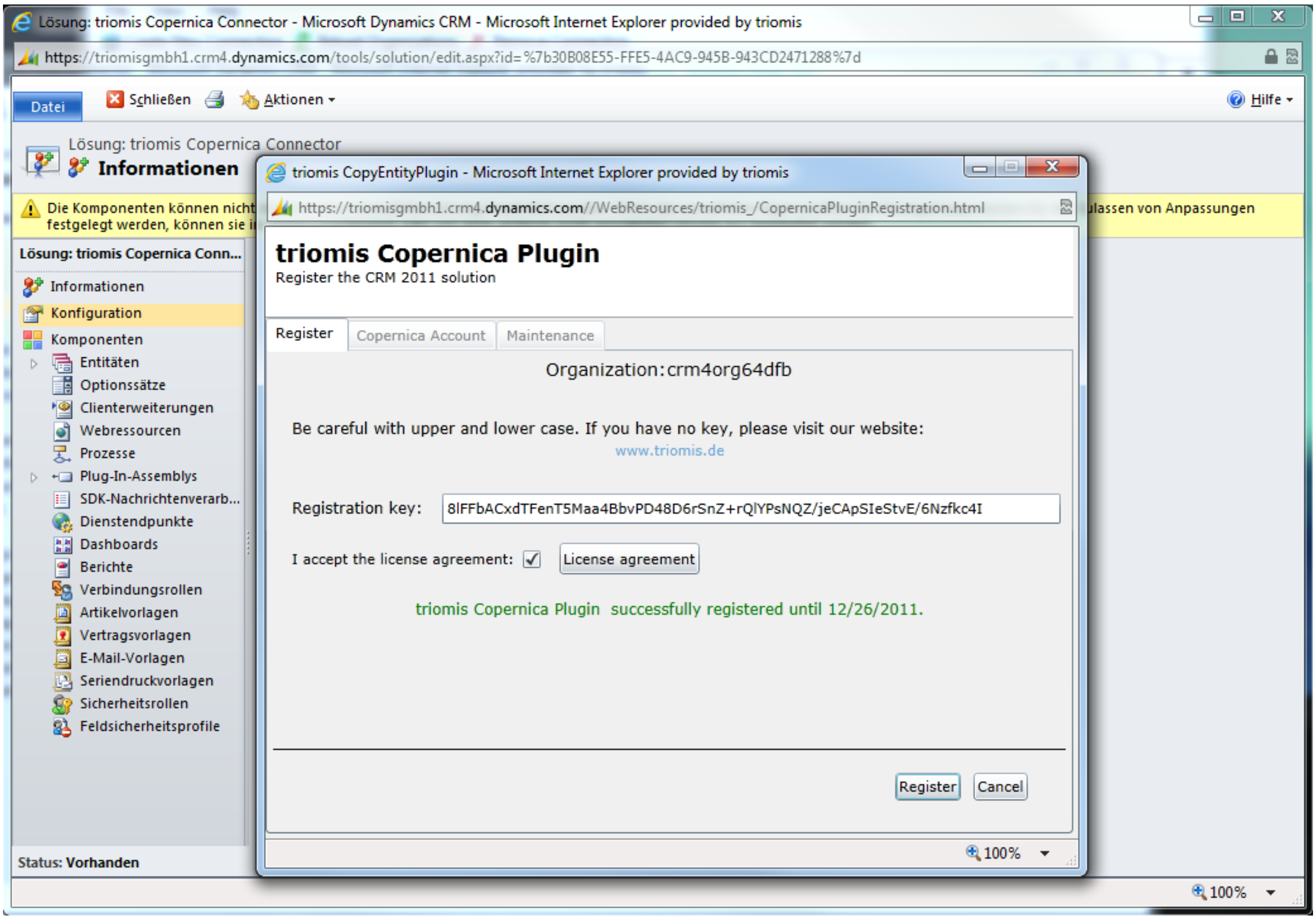
2.1. Setup

The installation package includes the 2011 CRM-solution file
triomisCopernicaConnec tor_0_1_1_managed.zip.
Go to Settings in CRM -> Solutions -> Import and load this file up to the Coperncia Connector install.

Set the checkbox to enable the processing steps so that the Copernica connector is active.

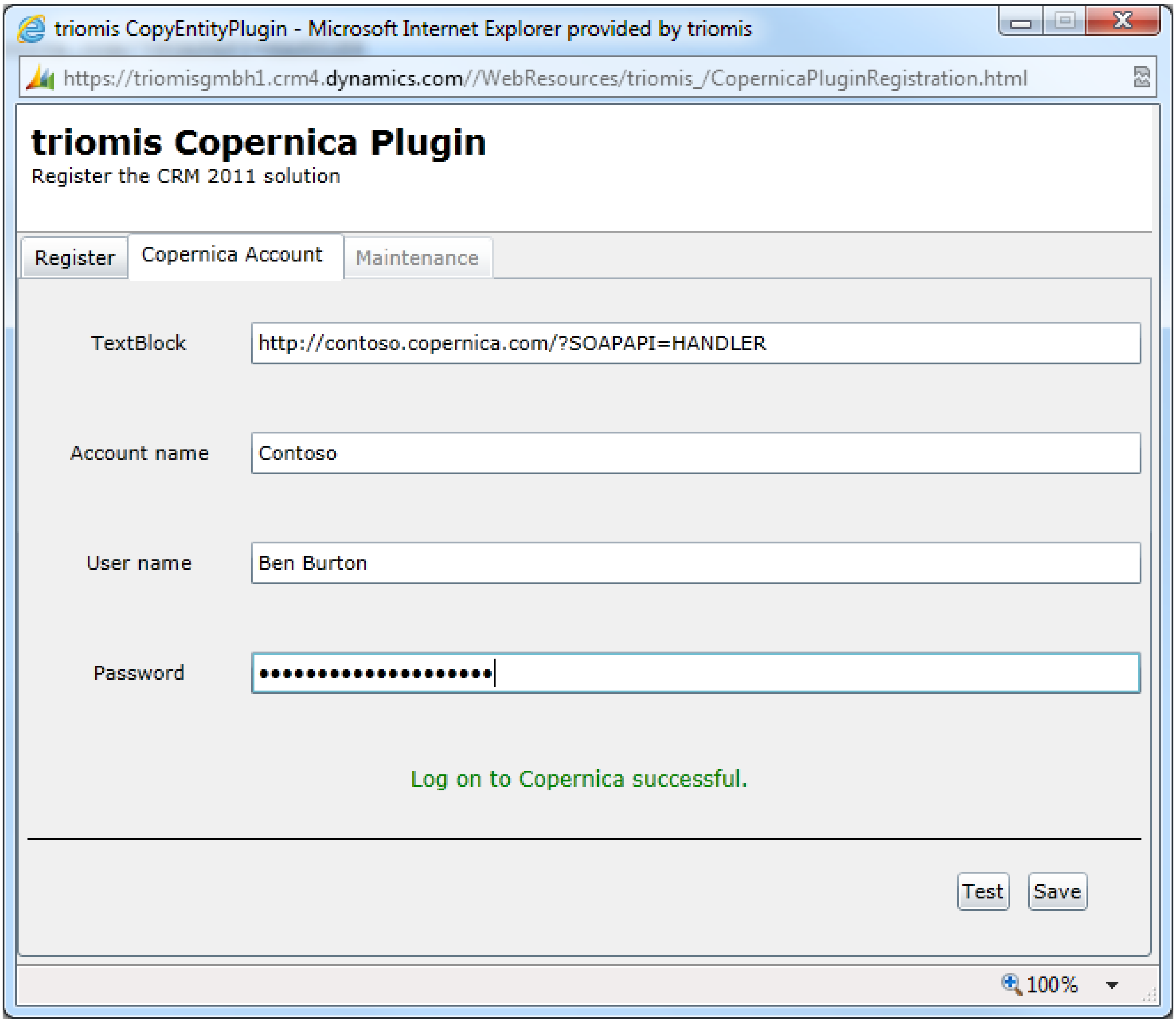


After installation, double-click the Copernica Connector solution to get to the configuration screen. Enter your beta key and click on Register.

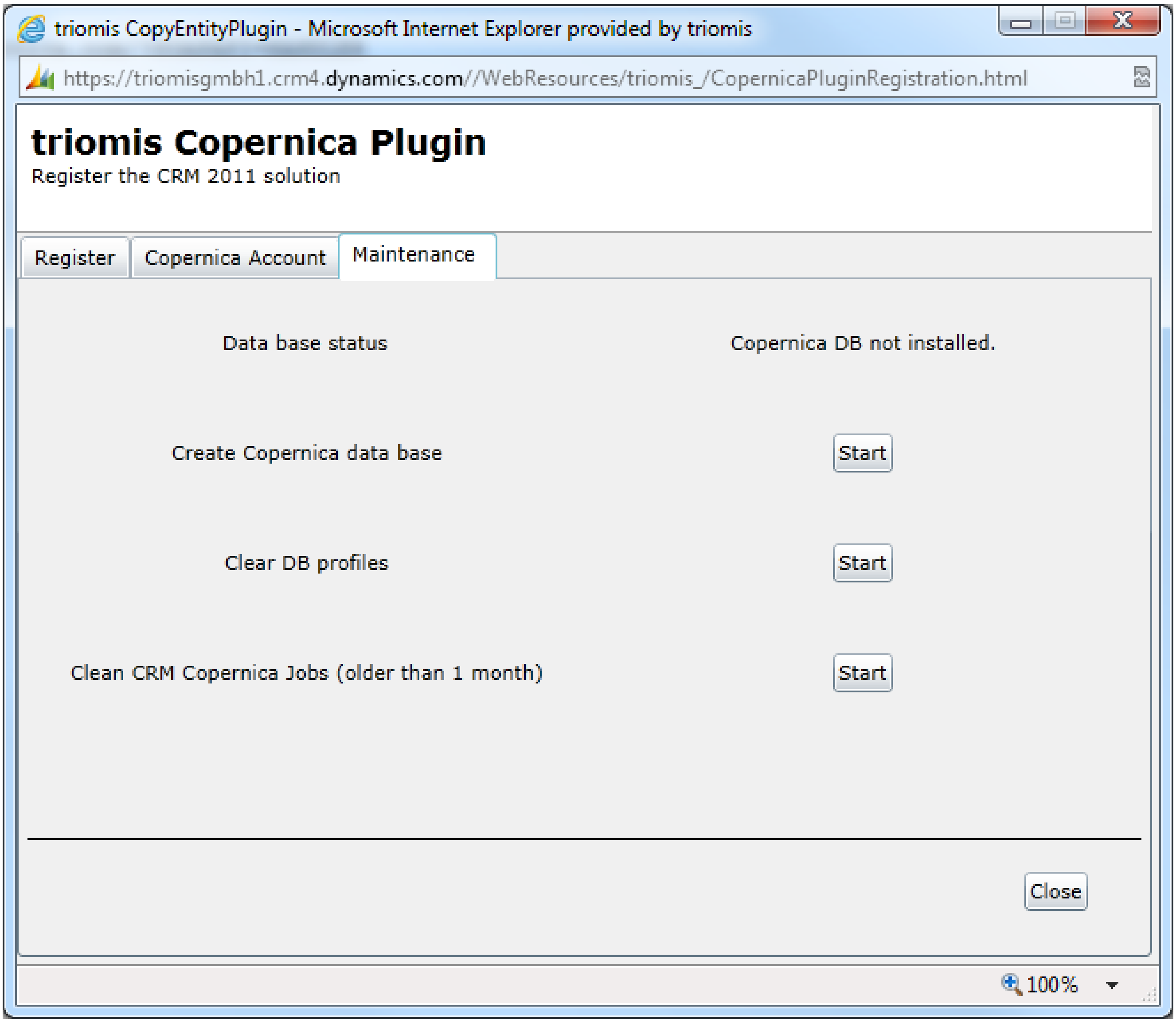


On the next tab enter the connection information for your Copernica account and click on test and after the success message, click Save.

Important: When entering the URL you need to write http:// in front of the URL. HTTPS is currently not supported. **/?SOAPAPI=HANDLER** must be written at the end of the URL.

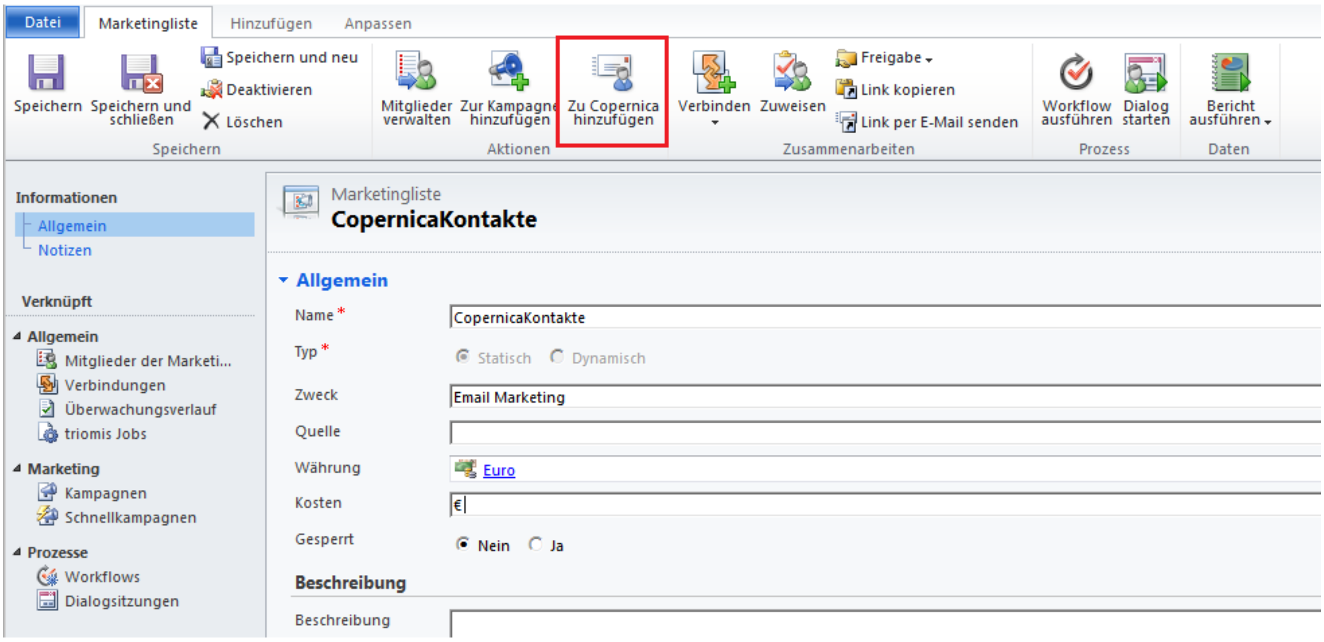


Then switch to the Maintenance tab and select the command "Create Copernica data base". This creates a new database in Copernica named “CRM Marketing”. Existing legacy databases in Copernica will not be changed.
The command "Clear DB profiles" is used to delete the profiles in the “CRM Marketing” database, in case you want to reset the profiles. There is no data in it your CRM or other Copernica databases deleted.



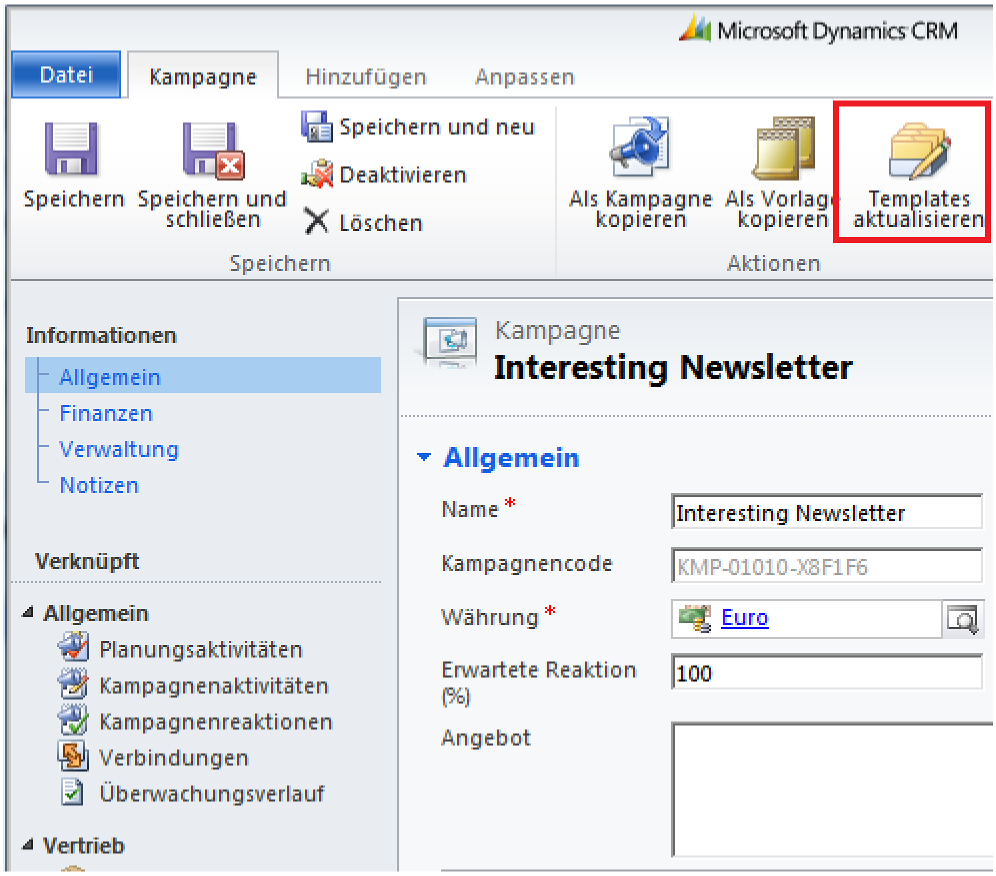
2.2. Load profiles to Copernica

Create a static marketing list containing the contacts to be used with the Copernica. Currently, only **static** lists and the **contact** type are supported. Take care that in the campaign, only those marketing lists are used, otherwise some of the Copernica Connector functions will not work.
Click "Add to Copernica" to start copying. If a contact does not yet exist in Copernica, it is added. If a contact already exists it will be updated with the data from CRM.
After clicking the button the message "process started" is shown. You get no feedback when the transaction is completed because the data are processed in the background. Please have patience this may take a few minutes, depending on the number of contacts. As rough estimate of the process it takes 1 minute for every 200 contacts.



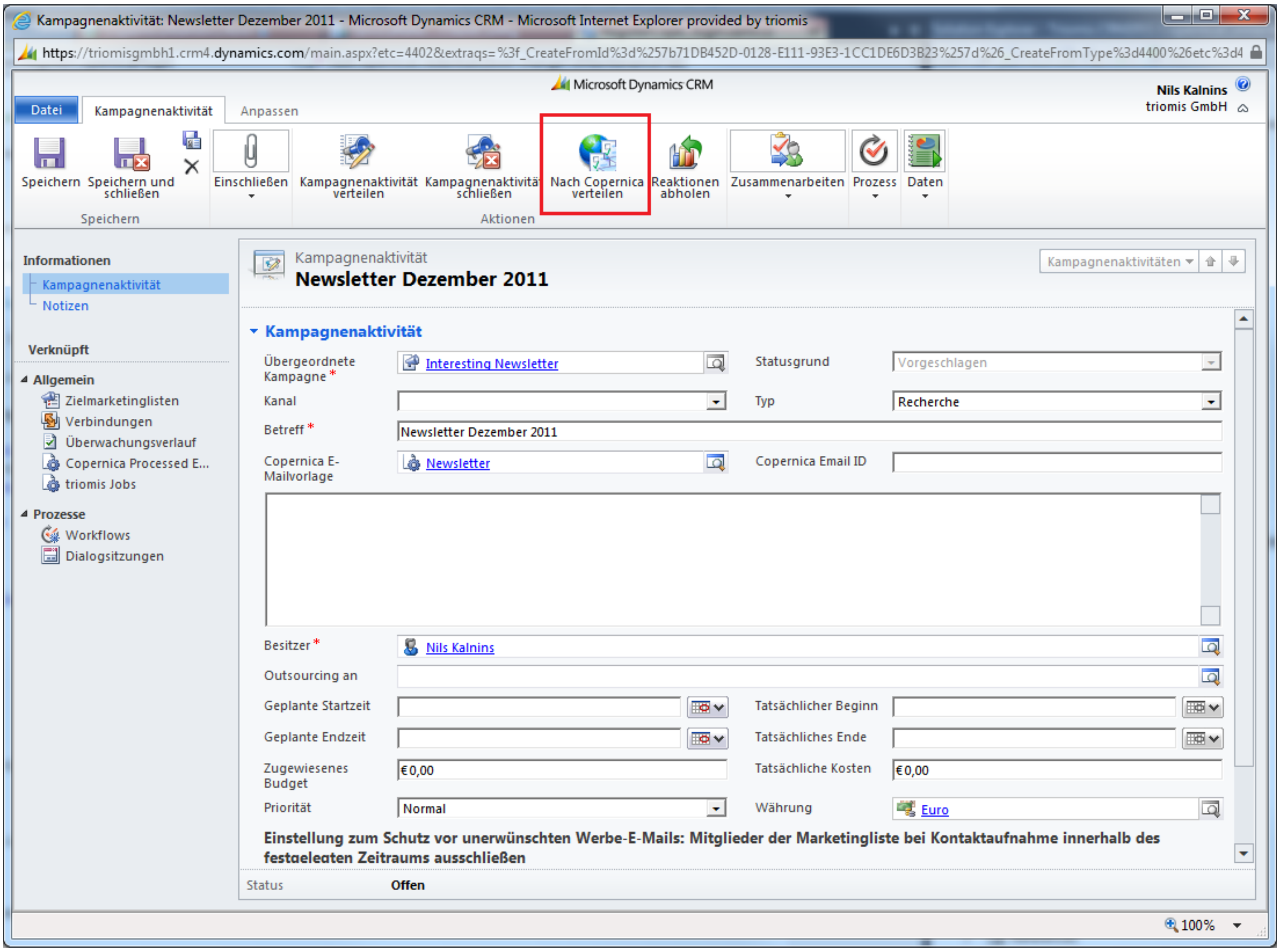
2.3. Load email templates to CRM

Create or open an existing campaign. Click on "Update Templates" to retrieve your Copercnia email templates. Please consult the documentation Copernica, if you do not have any templates and then do this action again.



2.4. Distribute campaign

Create a new campaign activity. Enter the template in the field “Copernica email template”. If the templates did not already load, wait 1-2 minutes and try again. If they still do not appear, repeat the last step “Load email templates to CRM”.
Save the campaign action and click on "Distribute to Copernica." The contacts of target marketing lists are now updated and a view in Copernica with the subject of the campaign activity will be created. Likewise, a new email is created in Coeprnica with the same name.
Therefore, the name of the campaign activity must be **unique**, otherwise the operation fails!

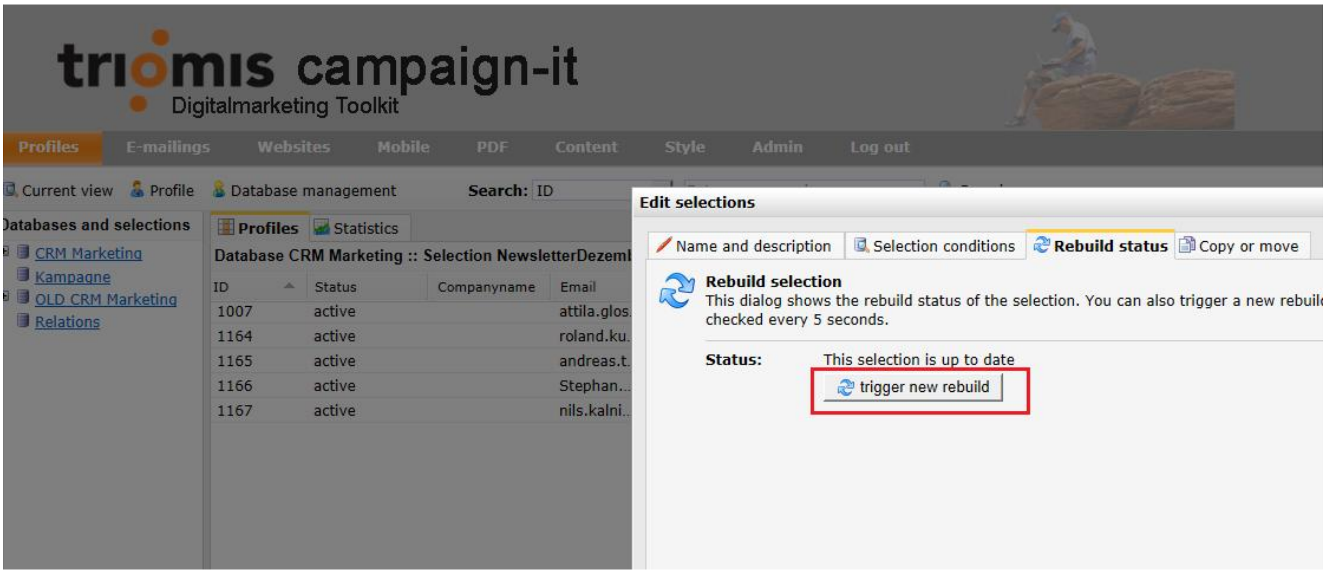


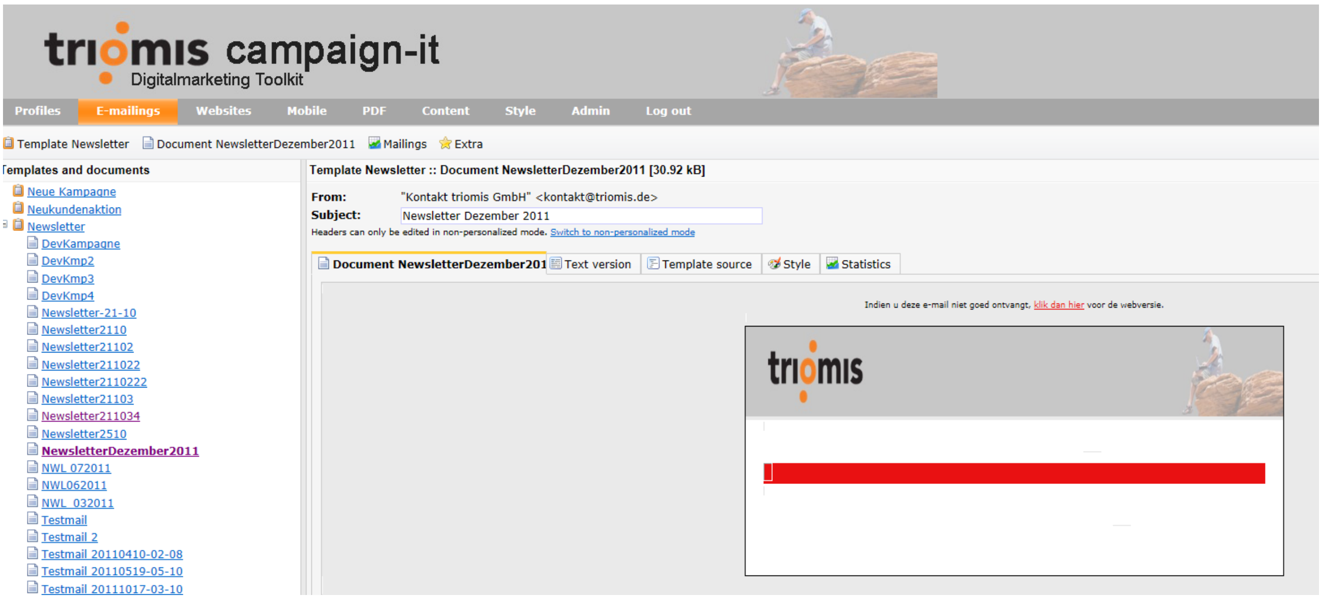
2.5. Send emails

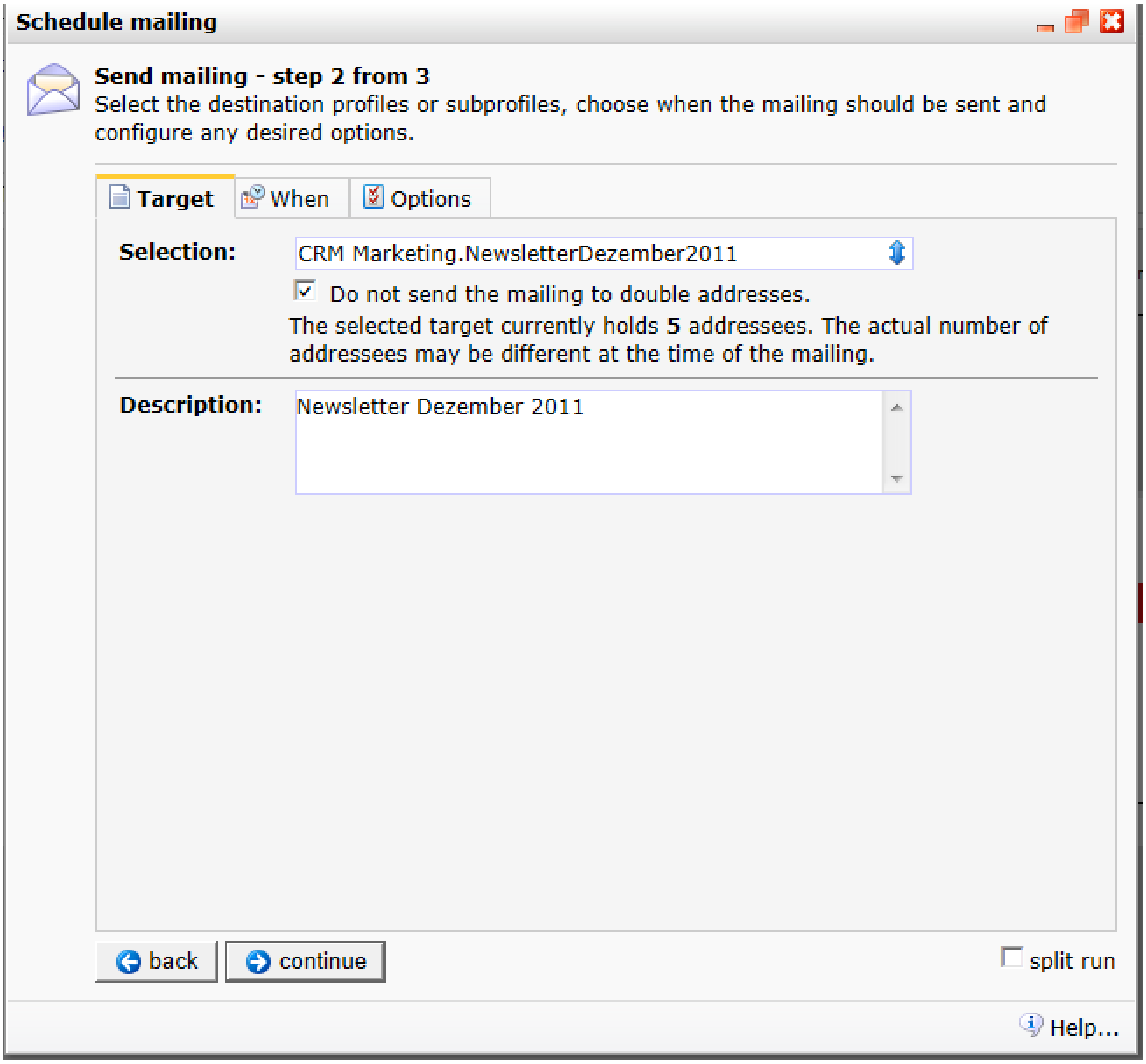
The next step takes place in the Copernica Web application. You create the email with the editor and sending in Copernica must be triggered manually.
Please check the database, if a view with the name of the campaign activity exists. If this is not the case, then go to database management -> Edit Selection. Select the new view and click on the tab "Rebuild status" and then "trigger new rebuild".

Create the email with the desired content.

To send the email campaign, go to Mailings -> Send mass mailing and choose the newly created view as target of the mailing. The view has the same name as the CRM campaign activity and the email document. Now you are ready to send.

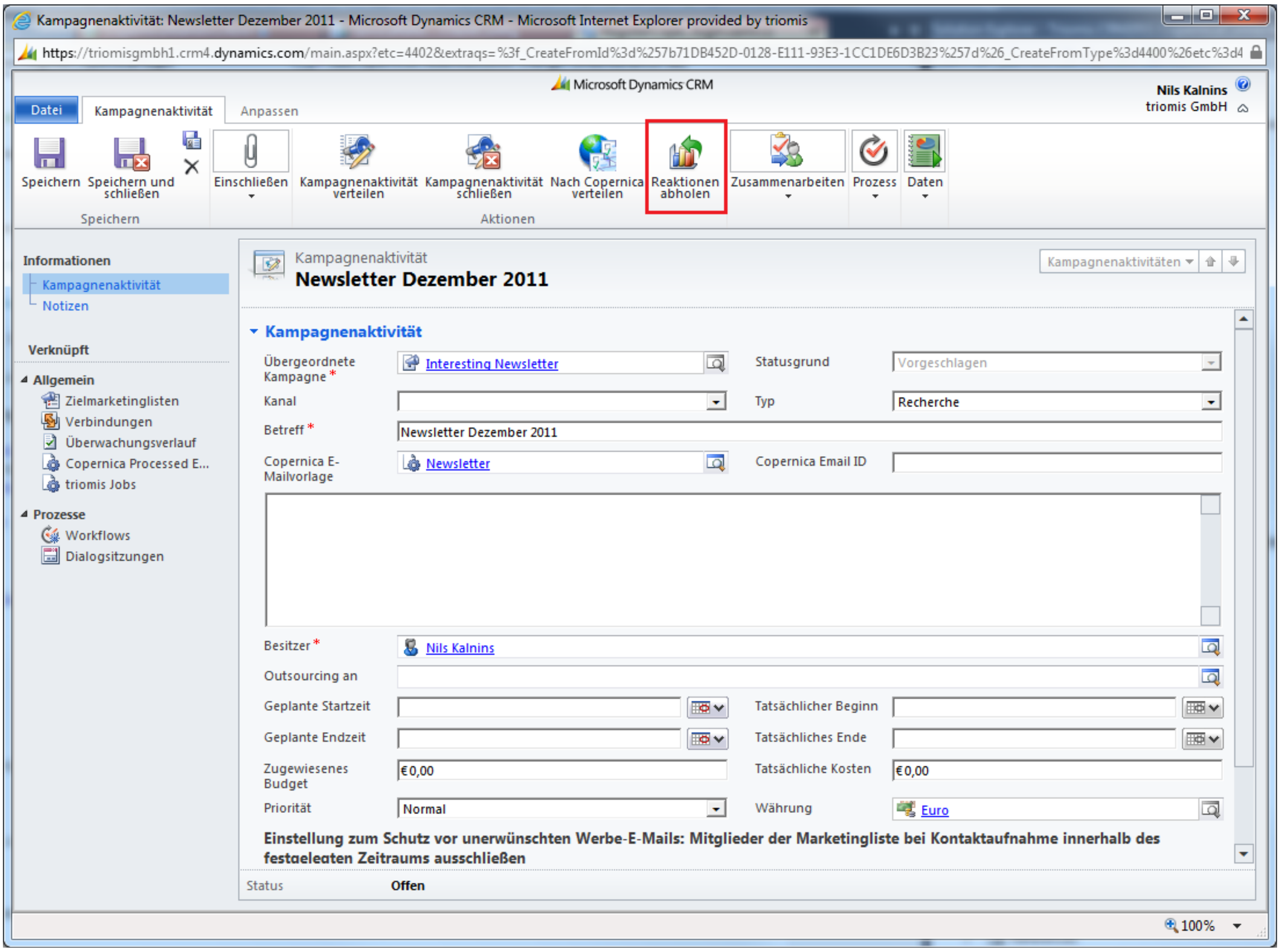


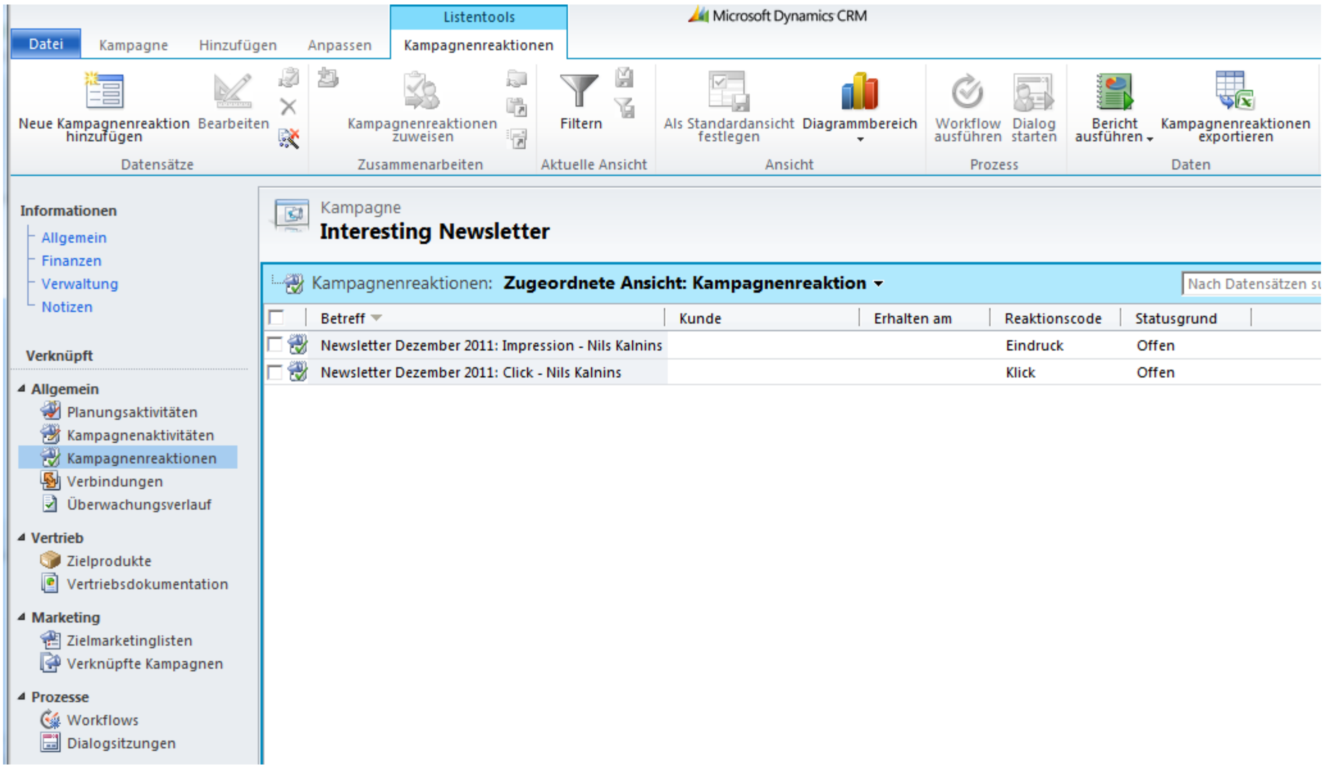



Schedule mailing
Send mailing - step 2 from 3
Select the destination profiles or subprofiles, choose when the mailing should be sent and configure any desired options.
Target
When
Options
Selection:
CRM Marketing.NewsletterDezember2011
Do not send the mailing to double addresses.
The selected target currently holds 5 addressees. The actual number of addressees may be different at the time of the mailing.
Description:
Newsletter Dezember 2011
back
continue
split run
Help...

2.6. Retrieve reactions

The reactions are measured and stored by Copernica. To make the responses available in CRM, go back to the campaign activity and click "Retrieve reactions". It is recommended to collect the responses 1-2 times a day, depending on the expected number of responses. You can also retrieve the reactions on demand (eg, evaluation, follow-up, etc.) to be up to date. It will pick up only new reactions and not generate duplicates.
In the event that the customer classifies the mail as spam, or hits the unsubscribe link, the "Do not send mail" flag will be set in CRM.




Listentools
Microsoft Dynamics CRM
Datei
Kampagne
Hinzufügen
Anpassen
Kampagnenreaktionen
Neue Kampagnenreaktion hinzufügen
Bearbeiten
Datensätze
Kampagnenreaktionen zuweisen
Zusammenarbeiten
Filtern
Aktuelle Ansicht
Als Standardansicht festlegen
Diagrammbereich
Ansicht
Workflow ausführen
Dialog starten
Prozess
Bericht ausführen
Kampagnenreaktionen exportieren
Daten
Informationen
Allgemein
Finanzen
Verwaltung
Notizen
Verknüpft
Allgemein
Planungsaktivitäten
Kampagnenaktivitäten
Kampagnenreaktionen
Verbindungen
Überwachungsverlauf
Vertrieb
Zielprodukte
Vertriebsdokumentation
Marketing
Zielmarketinglisten
Verknüpfte Kampagnen
Prozesse
Workflows
Dialogsitzungen
Kampagne
Interesting Newsletter
Kampagnenreaktionen: Zugeordnete Ansicht: Kampagnenreaktion
Nach Datensätzen su
Betreff
Kunde
Erhalten am
Reaktionscode
Statusgrund
Newsletter Dezember 2011: Impression - Nils Kalnins
Eindruck
Offen
Newsletter Dezember 2011: Click - Nils Kalnins
Klick
Offen

2.7. View Bug reports

Success and error reports for the various actions can be found under Settings -> System Jobs. The records are regarding "triomis job" and have the status of succeeded or failed. If an error occurs, please open the record and click on "details". The published text is particularly important for troubleshooting. Please copy and send it to info@triomis.de, at best with a brief description of what you have done before.