

Copernica Connector CRM Beta

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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@trionmis.de.

To operate the Copernica connector you need a Coperncia account and of course CRM 2011.

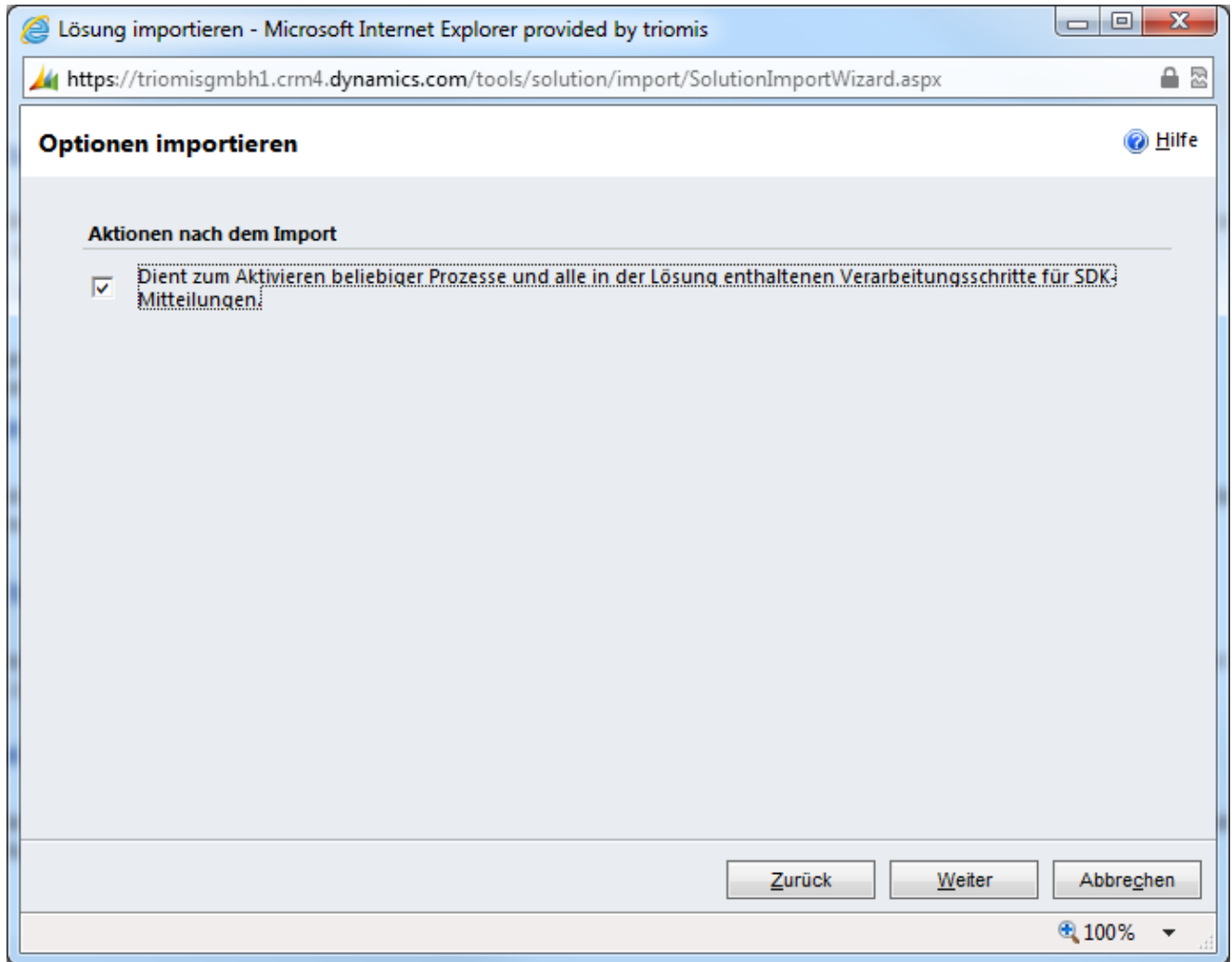
2. Chapters

2.1. Setup

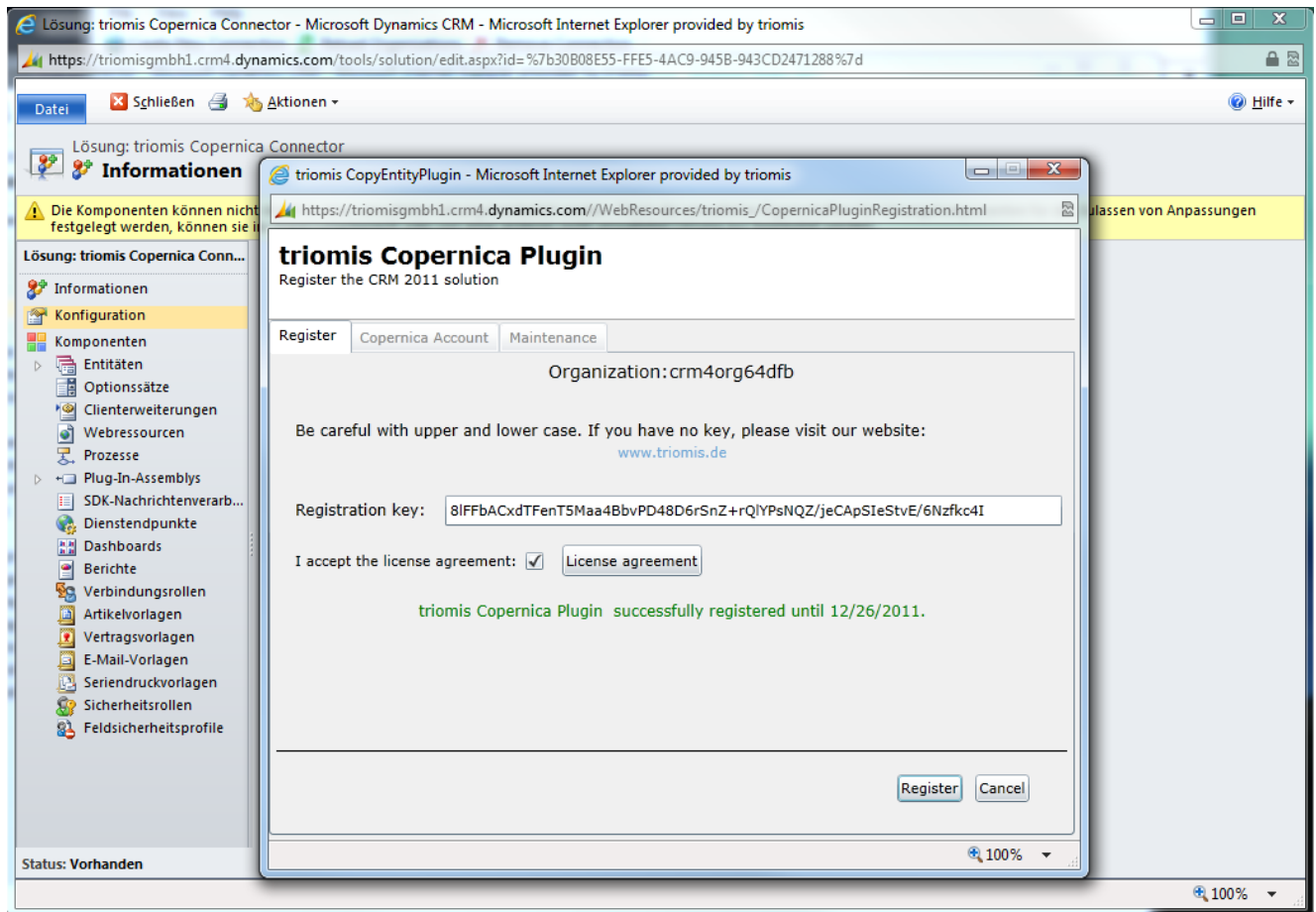
The installation package includes the 2011 CRM-solution file
trionisCopernicaConnector_0_1_1_managed.zip.

Go to Settings in CRM -> Solutions -> Import and load this file up to the Copernica 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.



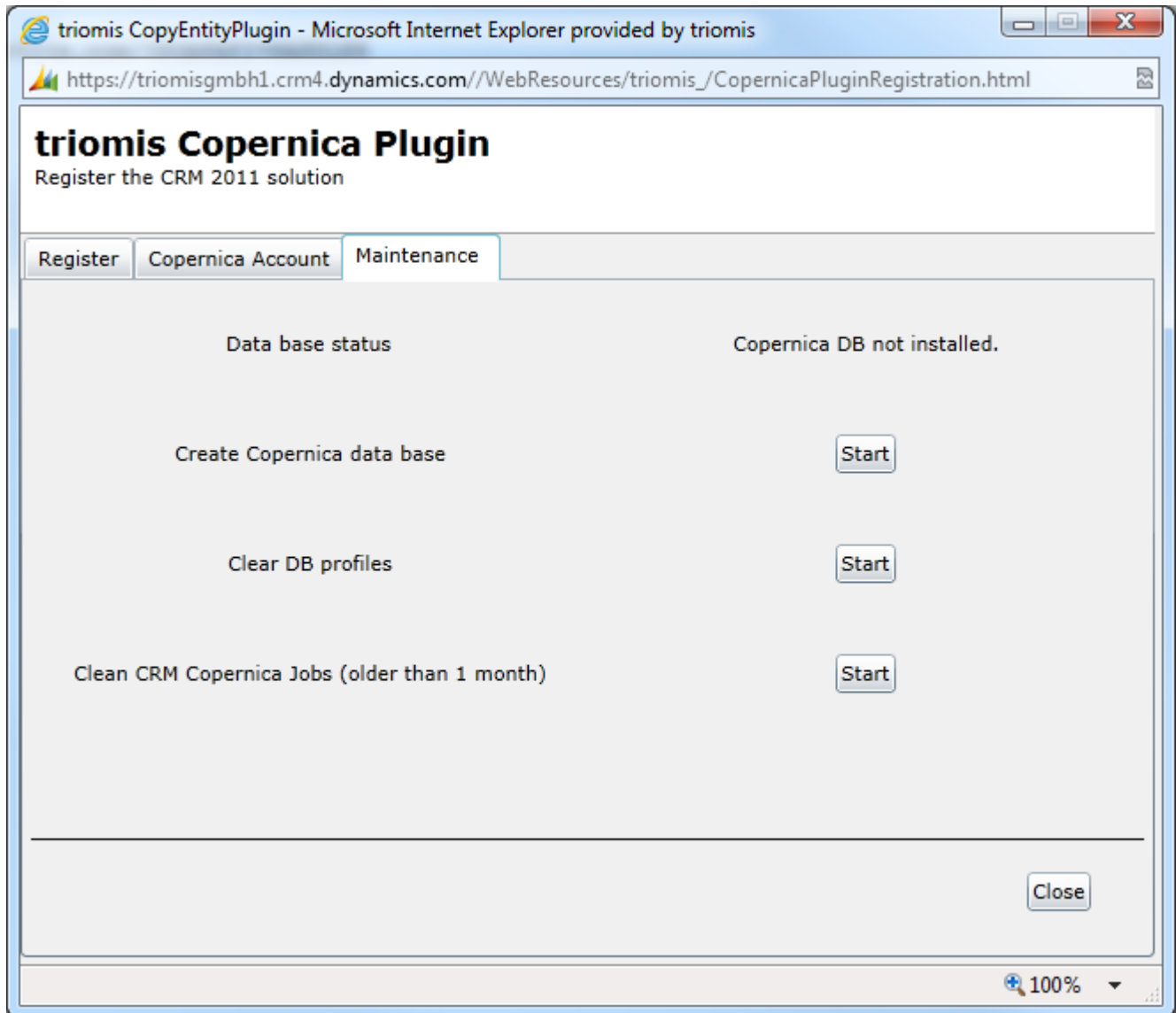
On the next tab enter the connection information for your Copernica account and click on test and after the success message, click Save.

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.

The screenshot shows a web browser window titled "trionis CopyEntityPlugin - Microsoft Internet Explorer provided by triomis". The address bar displays the URL: `https://trionisgmbh1.crm4.dynamics.com//WebResources/trionis_/CopernicaPluginRegistration.html`. The page content includes the heading "trionis Copernica Plugin" and the subtext "Register the CRM 2011 solution". Below this is a tabbed interface with three tabs: "Register", "Copernica Account", and "Maintenance". The "Register" tab is active. The form contains four input fields: "TextBlock" with the value `http://contoso.copernica.com/?SOAPAPI=HANDLER`, "Account name" with the value "Contoso", "User name" with the value "Ben Burton", and "Password" which is masked with dots. A green message "Log on to Copernica successful." is displayed below the password field. At the bottom right of the form are two buttons: "Test" and "Save". The browser's status bar at the bottom indicates a zoom level of 100%.

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.

The screenshot shows the Copernica software interface. At the top, there is a ribbon with tabs: 'Datei', 'Marketingliste', 'Hinzufügen', and 'Anpassen'. The 'Marketingliste' tab is active, showing various icons for actions like 'Speichern', 'Speichern und schließen', 'Deaktivieren', 'Löschen', 'Mitglieder verwalten', 'Zur Kampagne hinzufügen', 'Zu Copernica hinzufügen' (highlighted with a red box), 'Verbinden', 'Zuweisen', 'Link kopieren', 'Link per E-Mail senden', 'Freigabe', 'Workflow ausführen', 'Dialog starten', and 'Bericht ausführen'.

Below the ribbon, the left sidebar shows a tree view with 'Informationen' (Allgemein, Notizen), 'Verknüpft', 'Allgemein' (Mitglieder der Marketi..., Verbindungen, Überwachungsverlauf, triomis Jobs), 'Marketing' (Kampagnen, Schnellkampagnen), and 'Prozesse' (Workflows, Dialogsitzungen).

The main area displays the 'Marketingliste' configuration for 'CopernicaKontakte'. The 'Allgemein' section includes fields for 'Name' (CopernicaKontakte), 'Typ' (Statisch, Dynamisch), 'Zweck' (Email Marketing), 'Quelle', 'Währung' (Euro), 'Kosten' (€), and 'Gesperrt' (Nein, Ja). The 'Beschreibung' section has a 'Beschreibung' field.

2.3. Load email templates to CRM

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

The screenshot shows the Microsoft Dynamics CRM interface. The top ribbon is labeled 'Kampagne' (Campaign) and includes tabs for 'Datei' (File), 'Kampagne', 'Hinzufügen' (Add), and 'Anpassen' (Customize). The 'Kampagne' tab is active, showing a group of icons. The 'Templates aktualisieren' (Update Templates) icon, which depicts a folder with a pencil, is highlighted with a red rectangle. Below the ribbon, the left sidebar contains a navigation pane with 'Informationen' (Information) and 'Verknüpft' (Linked) sections. The 'Allgemein' (General) sub-tab is selected under 'Informationen'. The main area displays the details for a campaign named 'Interesting Newsletter'. The 'Allgemein' section includes fields for 'Name *' (Interesting Newsletter), 'Kampagnencode' (KMP-01010-X8F1F6), 'Währung *' (Euro), 'Erwartete Reaktion (%)' (100), and 'Angebot'.

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 Copernica with the same name.

Therefore, the name of the campaign activity must be **unique**, otherwise the operation fails!

Kampagnenaktivität: Newsletter Dezember 2011 - Microsoft Dynamics CRM - Microsoft Internet Explorer provided by triomis

https://triomisgmbh1.crm4.dynamics.com/main.aspx?etc=4402&extraqs=%3f_CreateFromId%3d%257b71DB452D-0128-E111-93E3-1CC1DE6D3B23%257d%26_CreateFromType%3d4400%26etc%3d4

Microsoft Dynamics CRM

Nils Kalnins
triomis GmbH

Datei Kampagnenaktivität Anpassen

Speichern Speichern und schließen Einschließen Kampagnenaktivität verteilen Kampagnenaktivität schließen Nach Copernica verteilen Reaktionen abholen Zusammenarbeiten Prozess Daten

Informationen

Kampagnenaktivität

Notizen

Verknüpft

Allgemein

Zielmarketinglisten

Verbindungen

Überwachungsverlauf

Copernica Processed E...

triomis Jobs

Prozesse

Workflows

Dialogsitzungen

Kampagnenaktivität

Newsletter Dezember 2011

Kampagnenaktivitäten

Kampagnenaktivität

Übergeordnete Kampagne * Interesting Newsletter

Statusgrund Vorgeschlagen

Kanal

Typ Recherche

Betreff * Newsletter Dezember 2011

Copernica E-Mailvorlage Newsletter

Copernica Email ID

Besitzer * Nils Kalnins

Outsourcing an

Geplante Startzeit

Tatsächlicher Beginn

Geplante Endzeit

Tatsächliches Ende

Zugewiesenes Budget € 0,00

Tatsächliche Kosten € 0,00

Priorität Normal

Währung Euro

Einstellung zum Schutz vor unerwünschten Werbe-E-Mails: Mitglieder der Marketingliste bei Kontaktaufnahme innerhalb des festaeleaten Zeitraums ausschließen

Status Offen

100%

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.

The screenshot shows the 'triomis campaign-it Digitalmarketing Toolkit' interface. The 'Edit selections' dialog box is open, displaying the 'Rebuild status' tab. The dialog contains the following information:

- Name and description:** Rebuild selection
- Description:** This dialog shows the rebuild status of the selection. You can also trigger a new rebuild checked every 5 seconds.
- Status:** This selection is up to date
- Action:** A button labeled 'trigger new rebuild' is highlighted with a red box.

In the background, a table titled 'Database CRM Marketing :: Selection NewsletterDezem...' is visible, showing columns for ID, Status, Companyname, and Email.

ID	Status	Companyname	Email
1007	active		attila.glos
1164	active		roland.ku.
1165	active		andreas.t.
1166	active		Stephan...
1167	active		nils.kalni...

The screenshot shows the 'triomis campaign-it Digitalmarketing Toolkit' interface. The 'Mailings' section is active, displaying a list of templates and documents. The 'Document NewsletterDezember2011' is selected, showing its details:

- From:** "Kontakt triomis GmbH" <kontakt@triomis.de>
- Subject:** Newsletter Dezember 2011
- Headers:** can only be edited in non-personalized mode. [Switch to non-personalized mode](#)

The document preview shows a red bar at the top, indicating the email content. The interface also includes a sidebar with a list of templates and documents, and a top navigation bar with tabs for Profiles, E-mailings, Websites, Mobile, PDF, Content, Style, Admin, and Log out.

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.

The screenshot shows the Microsoft Dynamics CRM interface for a campaign activity named "Newsletter Dezember 2011". The ribbon at the top includes buttons for "Speichern", "Speichern und schließen", "Einschließen", "Kampagnenaktivität verteilen", "Kampagnenaktivität schließen", "Nach Copernica verteilen", "Reaktionen abholen" (highlighted with a red box), "Zusammenarbeiten", "Prozess", and "Daten".

The main form area displays the following details:

- Kampagnenaktivität:** Newsletter Dezember 2011
- Übergeordnete Kampagne:** Interesting Newsletter
- Statusgrund:** Vorgeschlagen
- Kanal:** (empty dropdown)
- Typ:** Recherche
- Betreff:** Newsletter Dezember 2011
- Copernica E-Mailvorlage:** Newsletter
- Copernica Email ID:** (empty text field)
- Besitzer:** Nils Kalnins
- Outsourcing an:** (empty text field)
- Geplante Startzeit:** (empty date/time field)
- Tatsächlicher Beginn:** (empty date/time field)
- Geplante Endzeit:** (empty date/time field)
- Tatsächliches Ende:** (empty date/time field)
- Zugewiesenes Budget:** € 0,00
- Tatsächliche Kosten:** € 0,00
- Priorität:** Normal
- Währung:** Euro

At the bottom, there is a section for "Einstellung zum Schutz vor unerwünschten Werbe-E-Mails: Mitglieder der Marketingliste bei Kontaktaufnahme innerhalb des festaeleaten Zeitraums ausschließen". The status is set to "Offen".

Microsoft Dynamics CRM

Datei Kampagne Hinzufügen Anpassen **Listentools** **Kampagnenreaktionen**

Neue Kampagnenreaktion hinzufügen Bearbeiten Kampagnenreaktionen zuweisen Filtern Als Standardansicht festlegen Diagrammbereich Workflow ausführen Dialog starten Bericht ausführen Kampagnenreaktionen exportieren

Datensätze Zusammenarbeiten Aktuelle Ansicht Ansicht Prozess 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 sortieren

	Betreff	Kunde	Erhalten am	Reaktionscode	Statusgrund
<input type="checkbox"/>	Newsletter Dezember 2011: Impression - Nils Kalnins			Eindruck	Offen
<input type="checkbox"/>	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.

<div> <div>Neue Aktivität</div> <div>Neuer Datensatz</div> <div>Daten importieren</div> <div>Erweiterte Suche</div> </div>		<div> <div>Neu</div> <div>Tools</div> </div>																																													
<div> <div>Einstellungen</div> <div>Unternehmen</div> <div>System</div> <div>Anpassung</div> </div>		<div> <div>Systemaufträge</div> <div>Entität: Alle</div> <div> <div>Systemauftrags...</div> <div>Name des Systemauftrags</div> <div>Bezug</div> <div>Statusgrund</div> <div>Besitzer</div> </div> </div>																																													
		<table> <tr> <td><input type="checkbox"/></td><td>Systemereignis</td><td>Triomis.CRM2011.CopernicaConnector.JobPlugin: Crea...</td><td>triomis Job</td><td>Erfolgreich</td><td>Nils Kalnins</td></tr> <tr> <td><input type="checkbox"/></td><td>Systemereignis</td><td>Triomis.CRM2011.CopernicaConnector.JobPlugin: Crea...</td><td>triomis Job</td><td>Erfolgreich</td><td>Nils Kalnins</td></tr> <tr> <td><input type="checkbox"/></td><td>Systemereignis</td><td>Triomis.CRM2011.CopernicaConnector.JobPlugin: Crea...</td><td>Marketinglistenmi</td><td>Erfolgreich</td><td>Nils Kalnins</td></tr> <tr> <td><input type="checkbox"/></td><td>Workflow</td><td>Marketinglistenmitglieder zu Copernica hinzufügen</td><td>CopernicaKontakt</td><td>Erfolgreich</td><td>Nils Kalnins</td></tr> <tr> <td><input type="checkbox"/></td><td>Import</td><td>KontaktTemplate.xml</td><td>KontaktTemplate.x</td><td>Erfolgreich</td><td>Nils Kalnins</td></tr> <tr> <td><input type="checkbox"/></td><td>Transformation...</td><td>KontaktTemplate.xml</td><td>KontaktTemplate.x</td><td>Erfolgreich</td><td>Nils Kalnins</td></tr> <tr> <td><input type="checkbox"/></td><td>Importdateianal...</td><td>KontaktTemplate.xml</td><td>KontaktTemplate.x</td><td>Erfolgreich</td><td>Nils Kalnins</td></tr> </table>				<input type="checkbox"/>	Systemereignis	Triomis.CRM2011.CopernicaConnector.JobPlugin: Crea...	triomis Job	Erfolgreich	Nils Kalnins	<input type="checkbox"/>	Systemereignis	Triomis.CRM2011.CopernicaConnector.JobPlugin: Crea...	triomis Job	Erfolgreich	Nils Kalnins	<input type="checkbox"/>	Systemereignis	Triomis.CRM2011.CopernicaConnector.JobPlugin: Crea...	Marketinglistenmi	Erfolgreich	Nils Kalnins	<input type="checkbox"/>	Workflow	Marketinglistenmitglieder zu Copernica hinzufügen	CopernicaKontakt	Erfolgreich	Nils Kalnins	<input type="checkbox"/>	Import	KontaktTemplate.xml	KontaktTemplate.x	Erfolgreich	Nils Kalnins	<input type="checkbox"/>	Transformation...	KontaktTemplate.xml	KontaktTemplate.x	Erfolgreich	Nils Kalnins	<input type="checkbox"/>	Importdateianal...	KontaktTemplate.xml	KontaktTemplate.x	Erfolgreich	Nils Kalnins
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<input type="checkbox"/>	Transformation...	KontaktTemplate.xml	KontaktTemplate.x	Erfolgreich	Nils Kalnins																																										
<input type="checkbox"/>	Importdateianal...	KontaktTemplate.xml	KontaktTemplate.x	Erfolgreich	Nils Kalnins																																										

Systemauftrag: Triomis.CRM2011.CopernicaConnector.JobPlugin: Create of triomis_job - Microsoft - Microsoft Internet Explorer p

Datei

Schließen

Aktionen

Hilfe

Systemauftrag: Triomis.CRM2011.CopernicaConnector.JobPlugin: Create of triomis_job

Informationen

Informationen

Allgemein

Details

Verknüpft

Allgemein

Name

Triomis.CRM2011.CopernicaConnector.J

Typ

Systemereignis

Bezug

Kampagnenaktivität verteilen

Erstellt am

15.12.2011 17:34

Auftragsbesitzer *

Gerd Vertrieblch

Abgeschlossen am

15.12.2011 17:34

Anzahl der Wiederholungsvers...

0

Copernica Plugin Error: DEBUG

Details

Nachricht

Plugin Trace:

[Triomis.CRM2011.CopernicaConnector: Triomis.CRM2011.CopernicaConnector.JobPlugin]

[9d617a00-d024-e111-841c-00155d154961: Triomis.CRM2011.CopernicaConnector.JobPlugin: Create of triomis_job]

Context fetched

Got Webservice Reference!

*** Triomis.CRM2011.CopernicaConnector.JobPlugin ***

Context depth: 2

Config was changed: 12/15/2011 17:34:28

Getting job entity.

Job type: DistributeCampaign

Execution job of type Triomis.CRM2011.CopernicaConnector.Jobs.DistributeCampaignJob.

Status: Fehler

100%