

# Sitecore Dynamics CRM Connect

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# Who am I ?

Solutions Architect Sitecore

Sitecore MVP (2014-2016)

Twitter: @sitecoreclimber

Stackoverflow and stackexchange:

<http://sitecore.stackexchange.com/users?tab=Reputation&filter=year>

<http://stackoverflow.com/users/4616839/sitecore-climber>

# What does a CRM solution do?

CRM increase profitability in your sales, marketing, and service divisions.

CRM Tools help you:

- Centralize customer information
- Automate marketing interactions
- Provide business intelligence
- Facilitate communications
- Track sales opportunities
- Analyze data
- Enable responsive customer service

# Sitecore Experience Platform



Use xDB natively for List Segments, Personalization, etc.

# Product/Feature Background - Solutions

## Personalize Content and Segments with Pre-Existing Dynamics Marketing Lists

- *Pull pre-configured marketing lists from CRM and apply Sitecore Experiences to lists*
- *Info pulled includes: Contacts, Campaign name, Campaign Start & End Dates*

## xDB Can Pull Contact Data from Dynamics CRM

- *Name (first & last), job title, consent to be marketed to, email, telephone number and address*
- *xDB is only able to push Name (first & last) and email to Dynamics CRM*
  - *(Interactions, goals and outcomes planned for 8.3)*

# Product/Feature Background – Limitations

## Requires Sitecore 8.1+

- *Customers can still use old versions with DMS*
- *Both old and new version of tool can be used together*

## Synchronization is Not Automatic

- *Must be programed for timed increments via Sitecore scheduled tasks or*
- *Programmatically via an API*
- *Time needed for data re-indexing before use (total time dependent on data size)*

## Deletion of contact not allowed OOTB

- *While the tool can sync existing contact data between systems, it cannot delete contacts*
- *EXAMPLE: Contact deleted in Dynamics CRM, will remain in xDB (and vice versa)*

# Data Exchange Framework

Data Exchange Framework is designed to facilitate the transfer of data between two systems. The system being read from is called the *source* system. The system being written to is called the *target* system.

Data Exchange Framework is an ETL layer for Sitecore.

## Extract

is reading data from  
a *source* system

## Transform

Is converting the data that  
was read into a format that  
is compatible with  
a *target* system

## Load

writing the data to the  
target system



The diagram illustrates the Sitecore 8.1+ Data Exchange Framework architecture. It features a dark purple background with concentric circular patterns. At the top, a dark blue horizontal bar contains the text 'Sitecore 8.1+'. Below this, another dark blue horizontal bar contains the text 'Data Exchange Framework'. At the bottom, three rounded rectangular boxes are arranged horizontally: a dark blue box on the left labeled 'Sitecore Provider', a red box in the center labeled 'Dynamics CRM Provider', and a light green box on the right labeled 'Your custom provider'.

Sitecore 8.1+

Data Exchange Framework

Sitecore  
Provider

Dynamics CRM  
Provider

Your custom  
provider

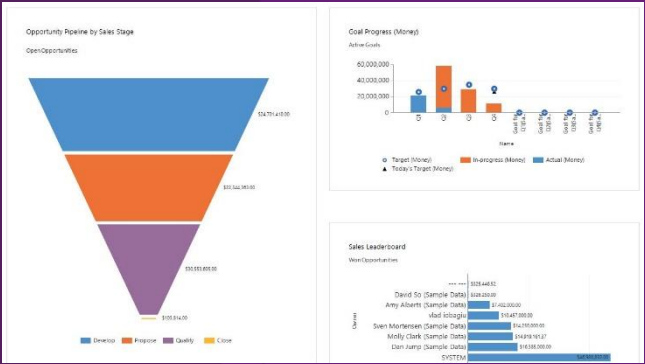


Bidirectional Synchronization of CRM  
Contacts and xdb Contacts



**KEEP  
CALM  
IT IS  
DEMO  
TIME**

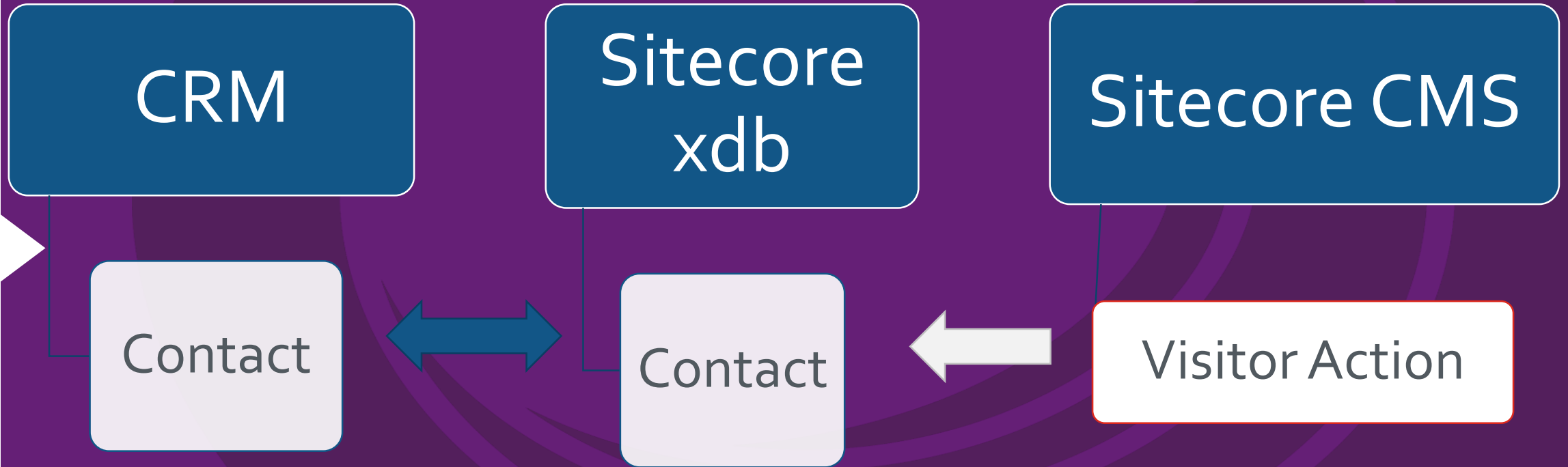
# Demo Environment



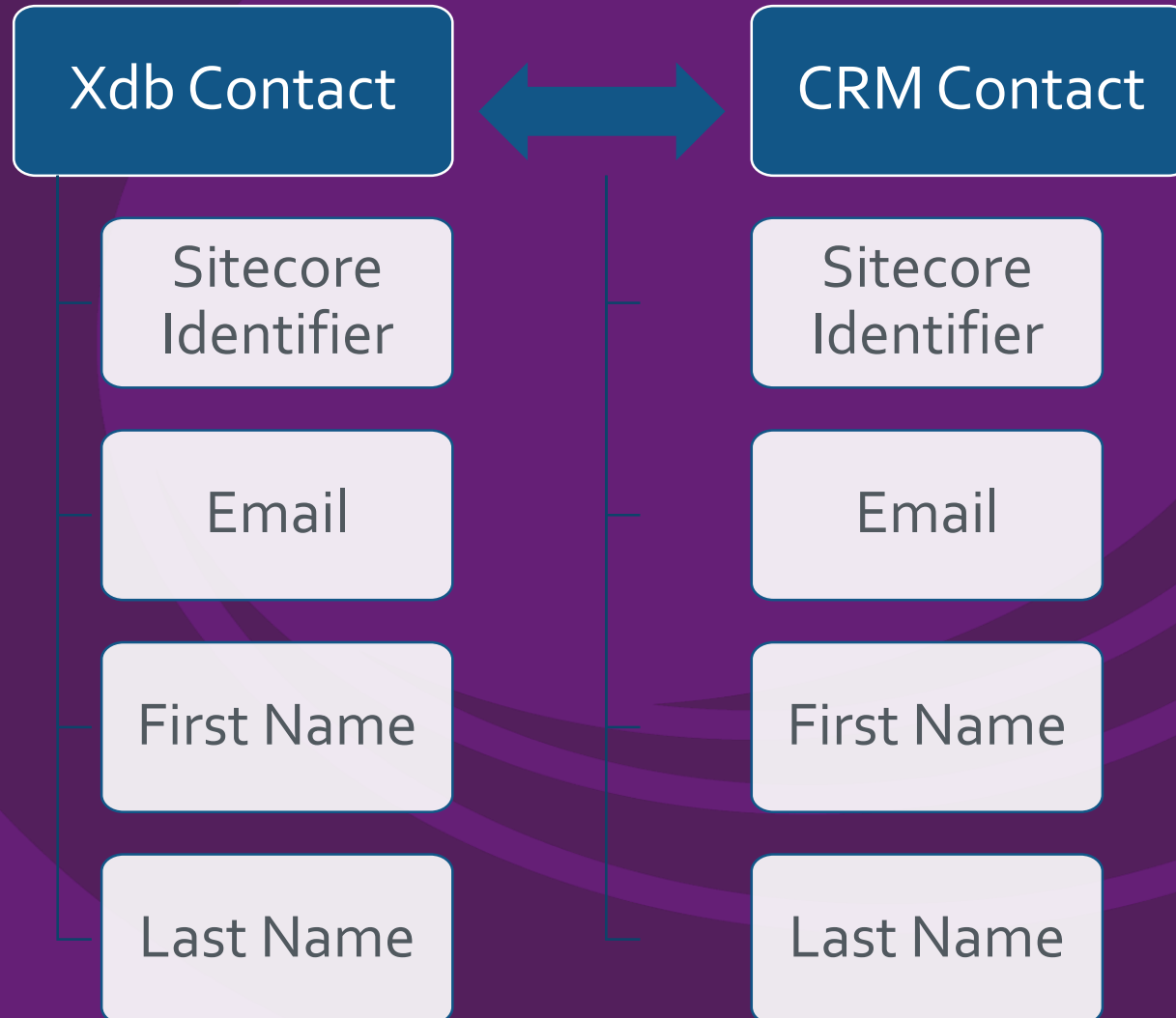
Dynamics 365

Habitat

Synchronize both directions



## Data Flow –Sync Xdb Contact to/from CRM Contact





# CRM Connect Basic Configuration

# Connection string

1. Add the connection String to the Sitecore ConnectionString.config file

```
<add name="mycrm"  
connectionString="Url=https://dynamicscrmsitecore.crm2.dynamics.com/XRMServices/2011/Organization.s  
vc; Organization=dynamicscrmsitecore.onmicrosoft.com; Username=username; Password=password;"/>
```

2. Create a Data Exchange Tenant under /sitecore/system/Data Exchange

3. Configure the Tenant Settings/XRM client entity repository with that connection string name

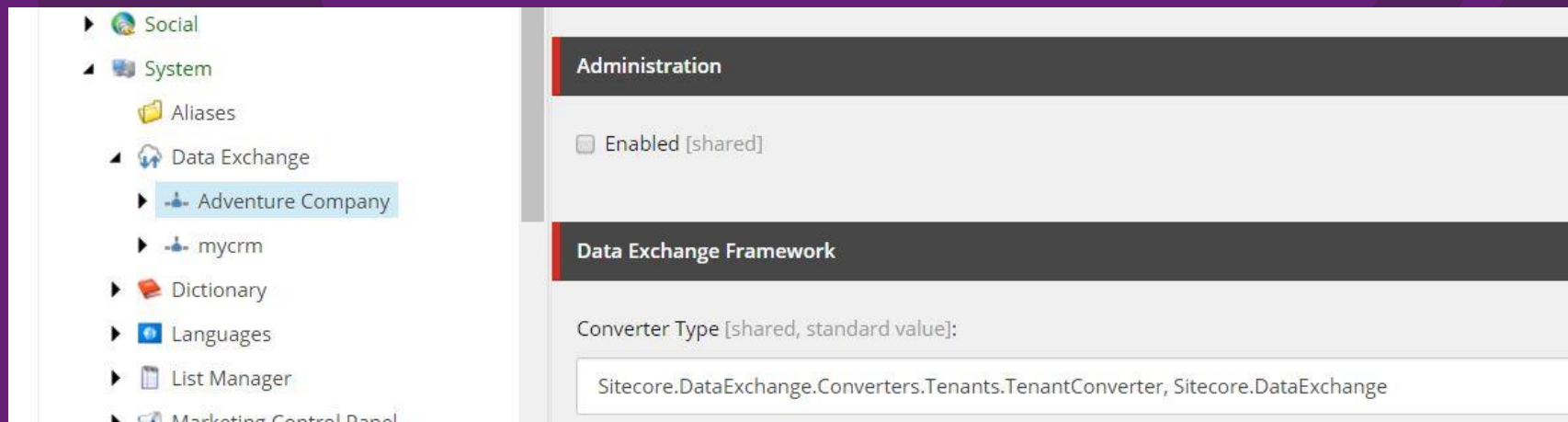
The screenshot displays the Sitecore user interface. On the left, a navigation pane shows the 'Data Exchange' tree structure. Under 'Data Exchange', there is a 'mycrm' tenant. The 'mycrm' tenant is expanded, showing sub-items: 'Data Access', 'Endpoints', 'Pipeline Batches', 'Pipelines', 'Queues', 'Tenant Settings', 'Dynamics CRM', 'Filter Expressions', 'Marketing Lists', 'Repository Sets', and 'mycrm' (highlighted). The 'mycrm' item is selected, and its details are shown on the right. The 'Quick Info' section displays the following information:

- Item ID: {950A12D4-185B-4E90-A7C7-599614B35B81}
- Item name: mycrm
- Item path: /sitecore/system/Data Exchange/mycrm/Tenant Settings/Dynamics CRM/Repository Sets/mycrm
- Template: /sitecore/templates/Data Exchange/Providers/Dynamics CRM/Repositories/XRM Client Entity Repository Set - {2F8E4B3}
- Created from: XRM Client Entity Repository Set, en, 1 - {2A7EA534-6969-4B2E-9EE8-E194BAB541DD}
- Item owner: sitecore\admin

The 'Settings' section shows the 'Connection String Name [shared]:' field with the value 'mycrm' entered.

## CRM Connect Configuration Basics

- All items related to Dynamics CRM are under system/DataExchange
- It's possible to create multiple independent Tenants



# Tenants, Pipeline Batch and Pipeline Configuration in General

## Tenant

### CRM Contacts to xDB Sync Pipeline Batch

#### Read CRM Contacts Pipeline

Set Use  
Delta Settings

Read CRM Contacts

Iterate CRM Contacts and Run Pipelines

### CRM Contact to xDB Contact Sync Pipeline

Resolve xDB Contact  
from Repository

Resolve xDB Contact  
from Queue

Apply Mapping



# Summary of the Configuration Steps

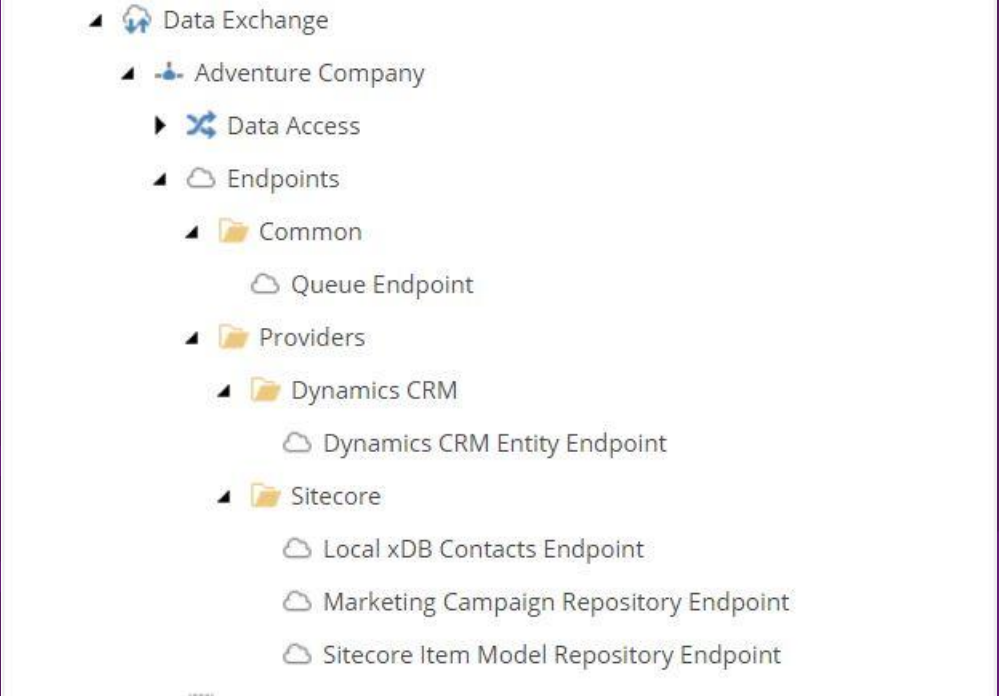
Ensure Endpoints  
Ensure Value Accessor Sets  
Ensure Value Mapping Sets

# Endpoints

An Endpoint represents a system you can read data from or write data to.

Queue Endpoint  
Generic CRM Entity Endpoint  
Xdb Contact Endpoint  
Marketing Campaign Endpoint  
Item Model Endpoint

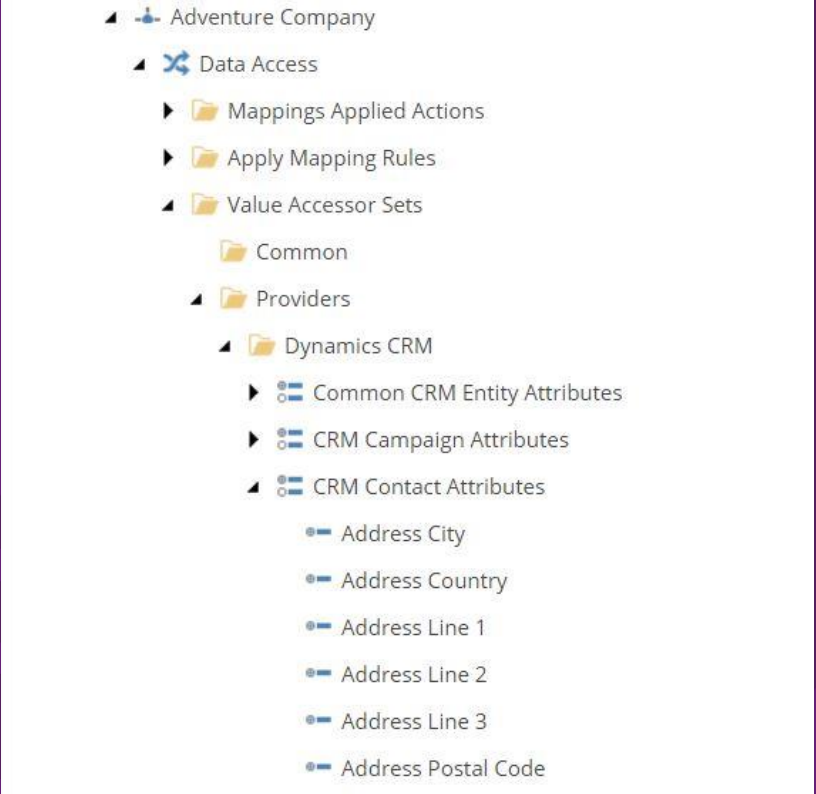
Note: The endpoint does not provide the ability to interact with the data source. It simply represents the data source.

- 
- A screenshot of a software interface showing a tree view of endpoints. The tree is organized as follows:
- ▲ Data Exchange
    - ▲ Adventure Company
      - ▶ Data Access
      - ▲ Endpoints
        - ▲ Common
          - Queue Endpoint
        - ▲ Providers
          - ▲ Dynamics CRM
            - Dynamics CRM Entity Endpoint
          - ▲ Sitecore
            - Local xDB Contacts Endpoint
            - Marketing Campaign Repository Endpoint
            - Sitecore Item Model Repository Endpoint

# Value Accessor Set

A *value accessor set* is a collection of *value accessor* objects. An example of a value accessor set is a collection of value accessors used to read or write a Sitecore item that represents a product.

Hint: A value accessor set is like a .NET class. A value accessor is like a .NET property. A value reader is like a property getter. A value writer is like a property setter.

- 
- Adventure Company
    - Data Access
      - Mappings Applied Actions
      - Apply Mapping Rules
      - Value Accessor Sets
        - Common
        - Providers
          - Dynamics CRM
            - Common CRM Entity Attributes
            - CRM Campaign Attributes
            - CRM Contact Attributes
              - Address City
              - Address Country
              - Address Line 1
              - Address Line 2
              - Address Line 3
              - Address Postal Code

# Value Mapping Sets – How to Map to/from CRM and XDB Items

## Xdb to CRM

Specify the Xdb Value Accessor as Source

Specify the CRM Value Accessor as Target

## CRM to Xdb

Specify the CRM Value Accessor as Source

Specify the Xdb Value Accessor as Target

**Value Mapping Sets Configuration**

**Left Pane (Tree View):**

- Pipeline Batches
- Pipelines
- Queues
  - Queue Processors
- Tenant Settings
- Value Mapping Sets
  - Clear CRM List Membership on xDB Contact
  - CRM Campaign to Sitecore Campaign
  - CRM Contact to xDB Contact
    - Address City**
    - Address Country
    - Address Postal Code
    - Address State or Province
    - Address Street Line 1
    - Address Street Line 2
    - Address Street Line 3
    - Consent Revoked
    - CRM Contact Id

**Right Pane (Configuration for Address City):**

Item name: Address City

Item path: /sitecore/system/Data Exchange/Adventure Company/Value Mapping Sets/CRM Contact to xDB Contact/

Template: /sitecore/templates/Data Exchange/Framework/Data Access/Mapping/Value Mapping - {450C8F38-91C9-4...

Created from: Data Exchange Tenant for Dynamics CRM Branch, en, 1 - {7E544830-D4CD-424C-BDBF-4D3A2D9D4470}

Item owner: sitecore\admin

**Source**

Source Accessor - Value accessor used to read the source value [shared]:

Data Access/Value Accessor Sets/Providers/Dynamics CRM/CRM Contact Attributes/Address City

**Target**

Target Accessor - Value accessor used to write the source value to the target object [shared]:

Data Access/Value Accessor Sets/Providers/Sitecore/xDB Contact Properties/Address City

The background is a solid purple color. Overlaid on this are several concentric circles of varying shades of purple, creating a subtle pattern. On the left side, there is a white arrow pointing horizontally towards the right, which serves as a pointer for the text.

Identifying and Matching Contacts in both Systems

# Identifying and Matching of Records in XdB/Dynamics Crm

## Identity the value on the Dynamics CRM contact you want to synchronize

The value from Dynamics CRM is the name of the attribute on the CRM contact entity that is used to store the value. Your Dynamics CRM administrator is able to provide you with the names of the available attributes.

The screenshot displays the Sitecore pipeline editor interface. On the left, a tree view shows the hierarchy of pipelines under 'xDB Contacts to CRM Sync Pipeline Batch'. The 'Resolve CRM Contact from Queue' pipeline is selected and highlighted in blue. The right pane shows the configuration for this pipeline, including the item owner, endpoints, and identifier settings.

**Item owner:** sitecore\admin

**Endpoints**

Endpoint From - Endpoint to read data from [shared]:

Endpoints/Common/Queue Endpoint

**Identifier**

Identifier Value Accessor [shared]:

Value Accessor Sets/Providers/Dynamics CRM/CRM Contact Attributes/Email

Identifier Object Location [shared]:

Pipeline Context Target

# Synchronize xdb Contacts to CRM Contacts

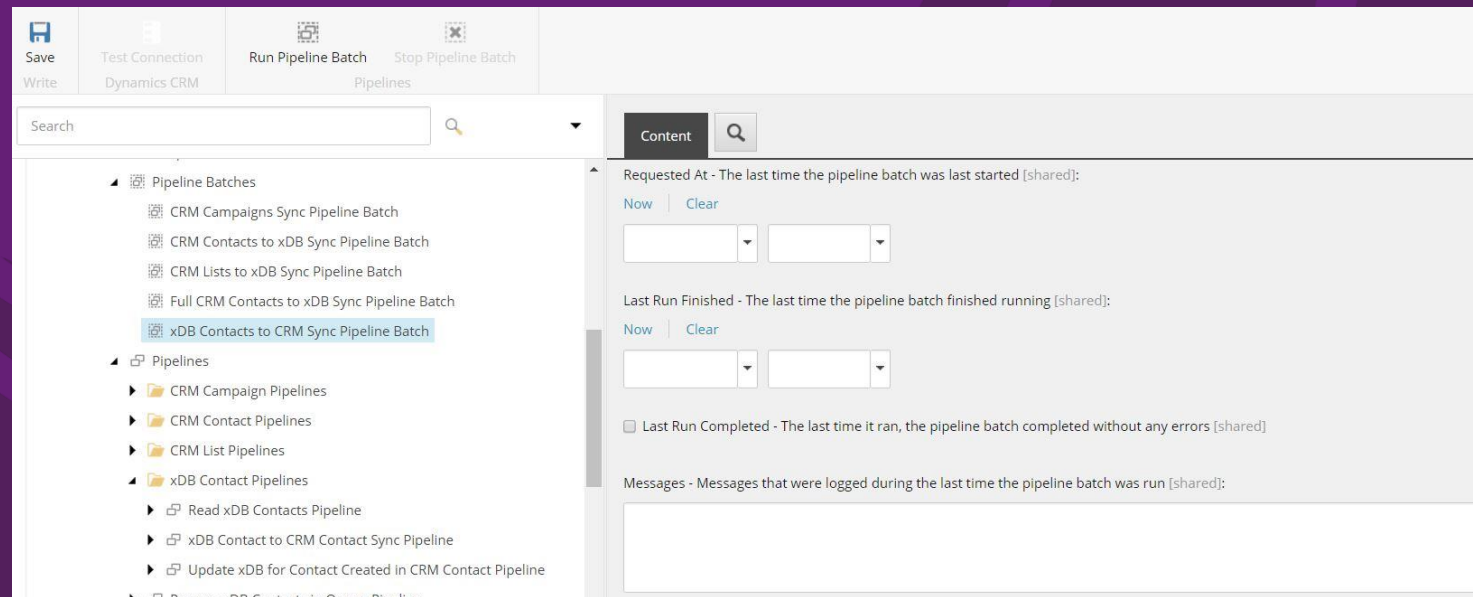
Open Content Editor

Go to Data Exchange/Pipeline Batches

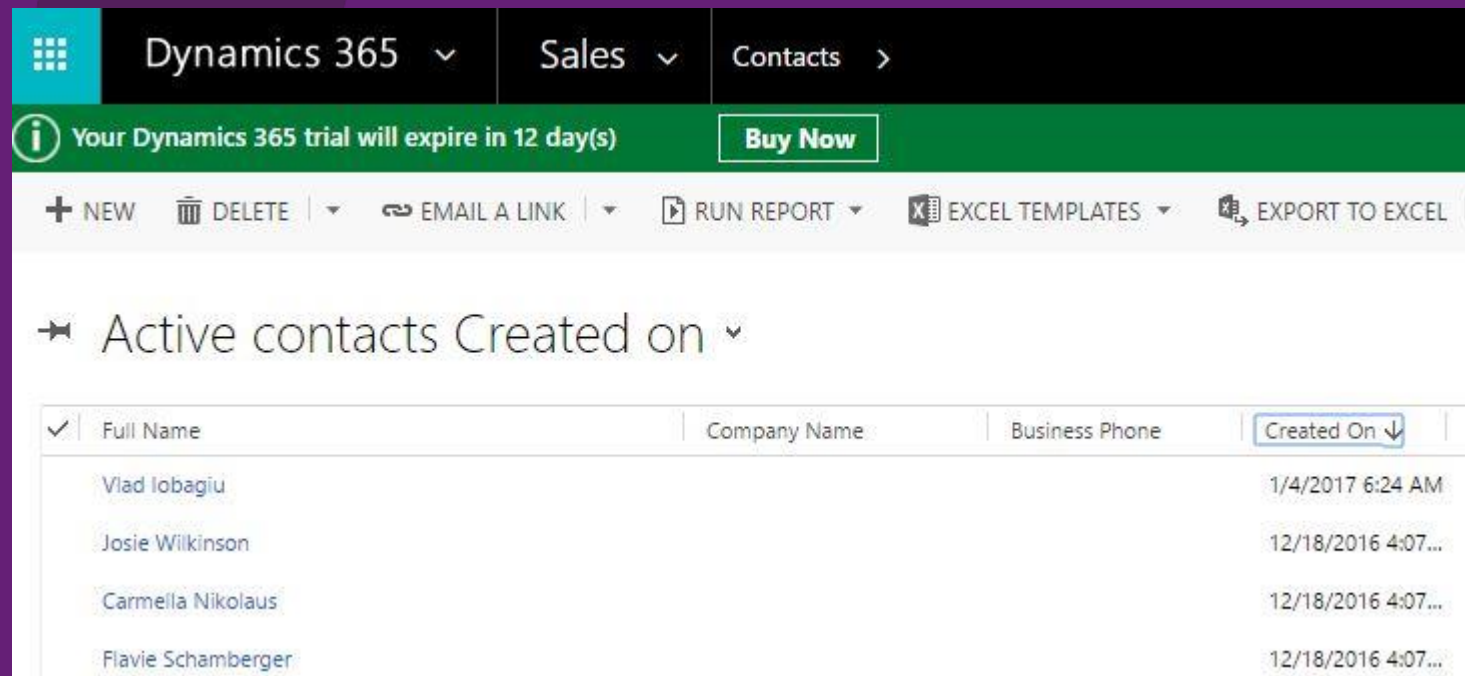
Xdb Contacts to CRM Sync Pipeline Batch

Push Run Pipeline Batch

Verify that the batch is finished



## Verify that the Contact has been created in Dynamics CRM



The screenshot displays the Microsoft Dynamics 365 Sales interface. At the top, the navigation bar shows 'Dynamics 365', 'Sales', and 'Contacts'. A green banner below the navigation bar indicates that the trial will expire in 12 days, with a 'Buy Now' button. Below the banner, a toolbar contains options: '+ NEW', 'DELETE', 'EMAIL A LINK', 'RUN REPORT', 'EXCEL TEMPLATES', and 'EXPORT TO EXCEL'. The main view is titled 'Active contacts Created on'. Below the title is a table with four columns: 'Full Name', 'Company Name', 'Business Phone', and 'Created On'. The table lists four contacts: Vlad Iobagiu, Josie Wilkinson, Carmella Nikolaus, and Flavie Schamberger. The 'Created On' column shows the creation date and time for each contact.

✓	Full Name	Company Name	Business Phone	Created On
	Vlad Iobagiu			1/4/2017 6:24 AM
	Josie Wilkinson			12/18/2016 4:07...
	Carmella Nikolaus			12/18/2016 4:07...
	Flavie Schamberger			12/18/2016 4:07...



# Marketer scenarios

Personalize my site for my contacts using data from CRM

Create segments that combine data from CRM and xDB

Track visitor activity & personalize using campaigns from CRM

# Scenario 1: Personalization

Add a new personalization condition.

Personalize the Component

Manage the personalization conditions, content, and design of the component. The list of conditions is prioritized. The first true condition determines which personalization content is displayed.

☐ Enable personalization of component design.

New Condition

Default

If none of the other conditions are true, the default condition is used.

☐ Hide Component

Personalize Content:

[Not set] Home

OK

Cancel

# Scenario 1: Personalization

*Add a new personalization condition.*

Select the marketing list condition.

The image shows two overlapping dialog boxes from a software interface. The background dialog is titled 'Personalize the Component' and contains instructions: 'Manage the personalization conditions, content, and design of the component. The list of conditions is prioritized. The first true condition determines which personalization content is displayed.' It has a 'New Condition' button at the top right. The foreground dialog is titled 'Rule Set Editor' and contains the following sections:

- Select the conditions for the rule:** A text input field containing the word 'marketing'.
- Dynamics CRM**: A text area containing the text 'where the visitor is a member of the marketing list specific marketing list from the tenant specific tenant'. The words 'specific marketing list' and 'specific tenant' are underlined and colored red.
- Rule description (click an underlined value to edit it):** A text area containing the text 'CRM marketing list member' followed by 'where the visitor is a member of the marketing list specific marketing list from the tenant specific tenant'. The words 'specific marketing list' and 'specific tenant' are underlined and colored red.

Both dialog boxes have 'OK' and 'Cancel' buttons at the bottom right.

# Scenario 1: Personalization

*Add a new personalization condition.*

*Select the marketing list condition.*

**Select a tenant.**

The image shows two overlapping dialog boxes from a software interface. The background dialog is titled "Personalize the Component" and contains a checkbox for "Enable personalization of component design." and a "New Condition" button. The foreground dialog is titled "Rule Set Editor" and contains a section "Select the conditions for the rule:" with a dropdown menu showing "marketing". Below this is a condition description: "Dynamics CRM where the visitor is a member of the marketing list specific marketing list from the tenant specific tenant". A blue arrow points to the underlined text "specific marketing list". At the bottom of the "Rule Set Editor" dialog is a "Rule description (click an underlined value to edit it):" section containing the text "CRM marketing list member" and "where the visitor is a member of the marketing list specific marketing list from the tenant specific tenant". Both dialogs have "OK" and "Cancel" buttons at the bottom.

# Scenario 1: Personalization

*Add a new personalization condition.*

*Select the marketing list condition.*

*Select a tenant.*

Available tenants are displayed.

The image shows two overlapping dialog boxes from a software interface. The background dialog is titled 'Personalize the Component' and contains instructions: 'Manage the personalization conditions, content, and design of the component. The list of conditions is prioritized. The first true condition determines which personalization content is displayed.' The foreground dialog is titled 'Rule Set Editor' and contains instructions: 'Select the conditions and actions for your rule first. Then, specify the values in the Rule Description field.' Inside the 'Rule Set Editor' dialog, there is a section 'Select the conditions for the rule:' with a text input field containing the word 'marketing'. Below this is a 'Select item' section with a 'BROWSE' button and a 'SEARCH' button. A list of items is displayed, with 'Adventure Company' highlighted by a blue arrow. Other items in the list include 'mycrm'. To the right of the 'Select item' section, there is a text input field with the placeholder text 'list from the tenant specific tenant'. At the bottom of the 'Rule Set Editor' dialog, there are 'OK' and 'Cancel' buttons. The 'Personalize the Component' dialog also has 'OK' and 'Cancel' buttons at the bottom right.

# Scenario 1: Personalization

*Add a new personalization condition.*

*Select the marketing list condition.*

*Select a tenant.*

*Available tenants are displayed.*

**Select a marketing list.**

**Personalize the Component**  
Manage the personalization conditions, content, and design of the component. The list of conditions is prioritized. The first true condition determines which personalization content is displayed.

**Rule Set Editor**  
Select the conditions and actions for your rule first. Then, specify the values in the Rule Description field.

**Select item**

**BROWSE** **SEARCH**

- Accessory Buyers
- Bloggers
- Computer Buyers
- Current Customers
- Home Appliance Buyers
- Online Reviewers
- Past Customers
- Personal Electronics Buyers
- Press Contacts
- Product Testers
- Social Media Influencers
- Video Buyers

the tenant specific tenant

the tenant specific tenant

**OK** **Cancel**

# Scenario 1: Personalization

*Add a new personalization condition.*

*Select the marketing list condition.*

*Select a tenant.*

*Available tenants are displayed.*

*Select a marketing list.*

*Available marketing lists are displayed.*

The personalization condition is configured.

The screenshot shows a 'Personalize the Component' dialog box with a dark header. Below the header, there is a checkbox 'Enable personalization of component design.' and a 'New Condition' button. The main area is divided into two sections: 'Default' and 'Edit rule'. The 'Default' section has a text box 'If none of the other conditions are true, the default condition is used.' and a 'Personalize Content:' section with a 'Hide Component' checkbox and a text box containing '[Not set] Home'. The 'Edit rule' section has a 'Specify name...' text box and a text box containing 'where the visitor is a member of the marketing list Past Customers from the tenant: mycrm'. At the bottom, there are 'OK' and 'Cancel' buttons.

**Personalize the Component**  
Manage the personalization conditions, content, and design of the component. The list of conditions is prioritized. The first true condition determines which personalization content is displayed.

☐ Enable personalization of component design. New Condition

**Default**

If none of the other conditions are true, the default condition is used.

☐ Hide Component

**Personalize Content:**  
[Not set] Home

**Edit rule**

Specify name...

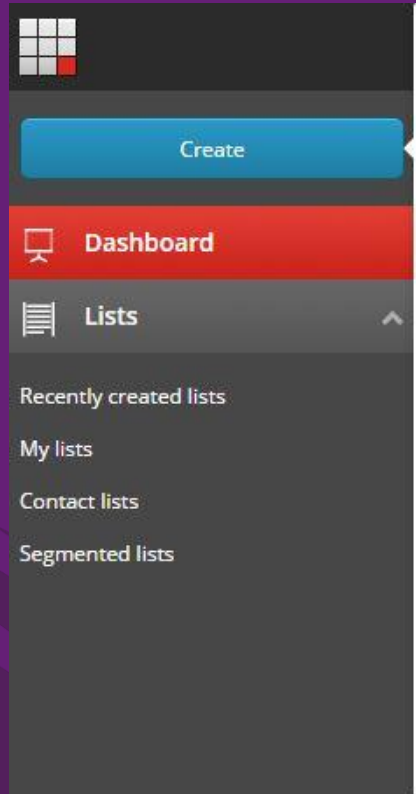
where the visitor is a member of the marketing list Past Customers from the tenant: mycrm

OK Cancel

# Scenario 2 : Segmentation



Open List Manager

Add a new segmented list.







The screenshot shows the List Manager interface. At the top, there is a 'Create' button. Below it, the 'Dashboard' and 'Lists' tabs are visible. The 'Lists' tab is selected, showing a list of 'Recently created lists' with sub-items: 'My lists', 'Contact lists', and 'Segmented lists'.

### Import new contacts

-  **Create list from file**  
Import contacts from a CSV file and create a Contact list.
-  **Import contacts without creating a list**  
Import contacts to the contacts database.

### Create list

-  **Contact list from existing list**  
Create a Contact list from an existing list.
-  **Empty Contact list**  
Create an empty Contact list that contacts can be added to at a later time.
-  **Segmented list from all contacts**  
Create a segmented list from all database contacts.
-  **Segmented list from existing list**  
Create a segmented list from an existing list.



# Scenario 2: Segmentation

*Add a new segmented list.*

Add a new condition.

Segmented list  
DASHBOARD

Logout | Administrator

Back Save

General information

Included lists

Segmentation

Contacts:

Enter search

Segmentation

Add new condition

Email First name Last name

No contacts found

List info

Created:

Type:

sc81dataex/sitecore/client/Applications/List Manager/Taskpages/Segmented list#

# Scenario 2: Segmentation

*Add a new segmented list.*

*Add a new condition.*

**Edit the condition.**

The screenshot shows a web application interface for managing segmented lists. At the top, there's a dark header with a logo on the left and 'Logout | Administrator' on the right. Below the header is a red banner with the text 'Segmented list' and 'DASHBOARD'. The main content area has a light gray background. On the left, there's a sidebar with four expandable sections: 'General information', 'Included lists', 'Segmentation', and 'Contacts'. The 'Segmentation' section is currently expanded, showing a 'Condition' section with the text 'This rule has no conditions.' and two buttons: 'Edit' and 'Remove'. To the right of the 'Condition' section, it says 'Matched by this condition: 0'. Below the 'Segmentation' section is the 'Contacts' section, which is also expanded. It shows a search bar with the placeholder 'Enter search criteria...' and a magnifying glass icon. Below the search bar is a table with three columns: 'Email', 'First name', and 'Last name'. The table is currently empty, with the text 'No contacts found' at the bottom. On the right side of the main content area, there's a 'List info' section with two fields: 'Created:' and 'Type:'. A 'Save' button is located in the top right corner of the main content area.

Segmented list  
DASHBOARD

Back Save

General information

Included lists

Segmentation

Condition

This rule has no conditions. Edit Remove Matched by this condition: 0

Contacts:

Enter search criteria...

Email First name Last name

No contacts found

List info

Created:

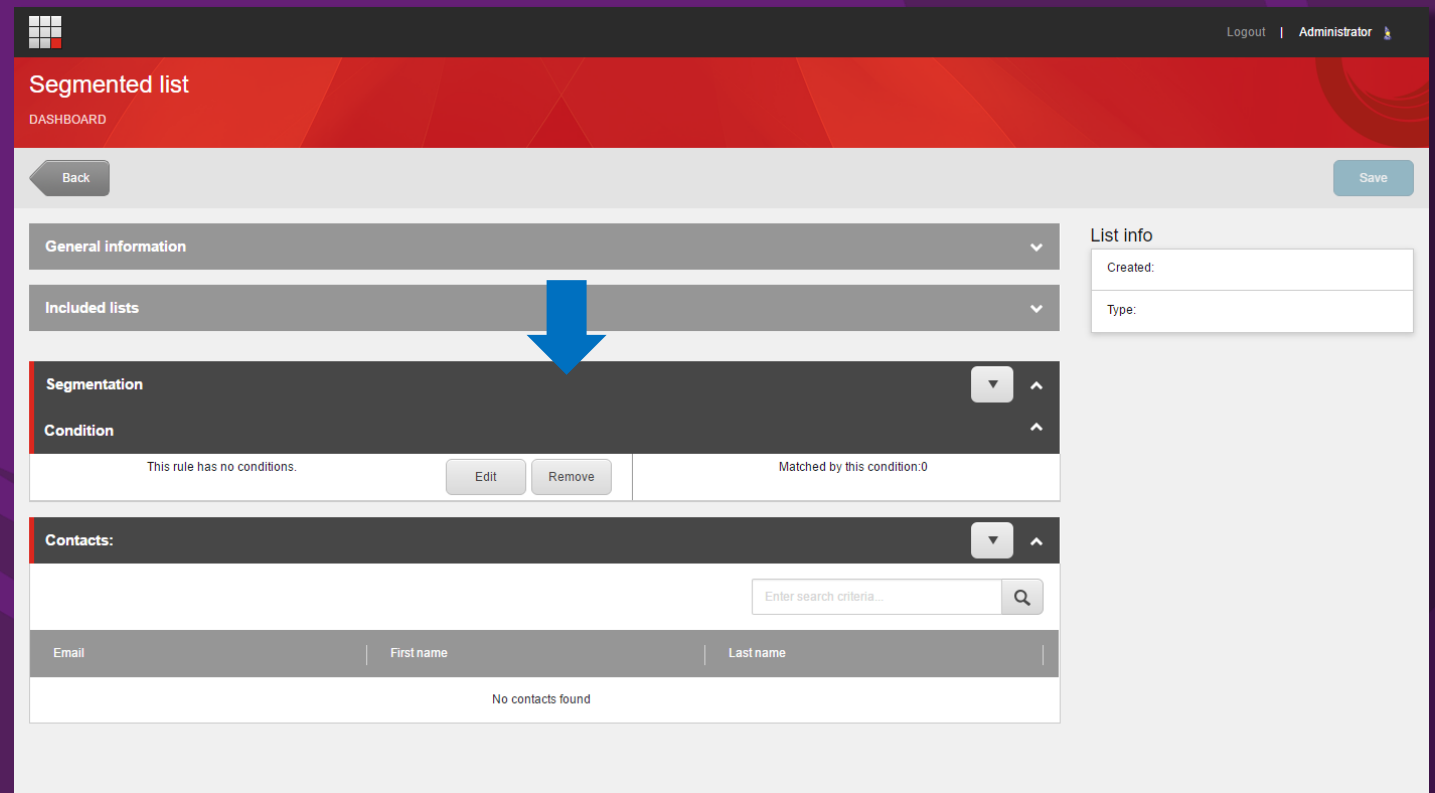
Type:

# Scenario 2: Segmentation

*Add a new segmented list.*

*Add a new condition.*

**Edit the condition.**



The screenshot shows a web application interface for managing segmented lists. At the top, there's a dark header with a logo and user information (Logout | Administrator). Below this is a red banner with the title 'Segmented list' and 'DASHBOARD'. The main content area has a light gray background and contains several sections: 'General information', 'Included lists', 'Segmentation', and 'Contacts:'. A blue arrow points to the 'Segmentation' section. The 'Segmentation' section is currently expanded, showing a 'Condition' sub-section. The condition is empty, displaying the text 'This rule has no conditions.' and 'Matched by this condition:0'. There are 'Edit' and 'Remove' buttons next to the condition text. The 'Contacts:' section is also expanded, showing a search bar with the placeholder 'Enter search criteria...' and a search icon. Below the search bar is a table with columns for 'Email', 'First name', and 'Last name'. The table is currently empty, displaying the text 'No contacts found'.

Segmented list  
DASHBOARD

Back Save

General information

Included lists

Segmentation

Condition

This rule has no conditions. Edit Remove Matched by this condition:0

Contacts:

Enter search criteria...

Email First name Last name

No contacts found

List info

Created:

Type:

# Scenario 2: Segmentation

*Add a new segmented list.*

*Add a new condition.*

*Edit the condition.*

Select the marketing list condition.

Rule Set Editor

Select the conditions and actions for your rule first. Then, specify the values in the Rule Description field.

Select the conditions for the rule:

Search for a condition

Dynamics CRM

where the contact is a member of the marketing list specific marketing list from the tenant specific tenant

Segment Builder

where the city compares to specific city

where the contact classification compares to specific value

where the country compares to specific country

where the number of engagement value points compares to number

Rule description (click an underlined value to edit it):

Condition Name

This rule has no conditions.

Total number of contacts: 0

OK

Cancel

# Scenario 2: Segmentation

*Add a new segmented list.*

*Add a new condition.*

*Edit the condition.*

*Select the marketing list condition.*

**Segment list is configured.**

The screenshot displays a CRM Segmentation interface. At the top, a dark header bar contains the title "Segmentation" and a plus icon. Below this, a "Rule" configuration section is visible. It contains two conditions: "where the country is equal to United States" and "and where the contact is a member of the marketing list Accessory Buyers from the tenant mycrm". To the right of the conditions are "Edit rule" and "Remove rule" buttons. Further right, it states "Contacts that match this rule: 2979". Below the rule configuration, a section titled "Contacts: 2979" shows a table of contacts. The table has three columns: "Email", "First name", and "Last name". A search bar with the placeholder "Enter search criteria..." is located above the table. The table lists several contacts, including Ruby Gleason, Lillian Trantow, Jacqueline Murazik, Jordy Friesen, Ozella Medhurst, Hanna Stracke, Payton Kohler, Manuel Heidenreich, and Austin Fadel.

Email	First name	Last name
ruby_gleason@flatleyhuels.name	Ruby	Gleason
lillian.trantow@eichmann.ca	Lillian	Trantow
jackeline_murazik@kreigerharber.co.uk	Jackeline	Murazik
jordy.friesen@hagenes.ca	Jordy	Friesen
ozella.medhurst@schaefer.info	Ozella	Medhurst
hanna_stracke@koelpin.name	Hanna	Stracke
payton_kohler@beer.us	Payton	Kohler
manuel.heidenreich@mayerhuecker.name	Manuel	Heidenreich
austin.fadel@felwebner.uk	Austin	Fadel

# Scenario 3: Campaign integration

Run the pipeline CRM Campaigns Sync Pipeline Batch

The screenshot displays the configuration and execution details for the 'CRM Campaigns Sync Pipeline Batch'. On the left, a navigation pane lists various components, with 'Pipeline Batches' expanded to show the selected batch. The main panel on the right provides execution controls and status information.

**Requested At** - The last time the pipeline batch was last started [shared]:  
Now | Clear  
1/6/2017 | 3:35 PM

**Last Run Finished** - The last time the pipeline batch finished running [shared]:  
Now | Clear  
1/6/2017 | 3:35 PM

☒ **Last Run Completed** - The last time it ran, the pipeline batch completed without any errors [shared]

**Messages** - Messages that were logged during the last time the pipeline batch was run [shared]:

1/6/2017 1:35:21 PM	INFO	Entities were read from Dynamics CRM. (pipeline step: Read CRM Campaigns, endpoint: Dynamics CRM Entity Endpoint, entity: campaign)
1/6/2017 1:35:40 PM	INFO	43 elements were iterated. (pipeline: Read CRM Campaigns Pipeline, pipeline step: Iterate CRM Campaigns and Run Pipelines)
1/6/2017 1:35:40 PM	INFO	Campaign category was created. (pipeline: Process Sitecore Campaigns in Queue Pipeline, pipeline step: Resolve Sitecore Campaign Category.
1/6/2017 1:35:43 PM	INFO	43 campaigns were saved.

# Scenario 3: Campaign integration

Add campaign link to url (or assign to Sitecore item).

The screenshot displays the Sitecore Marketing Control Panel interface. On the left, a tree view shows the hierarchy: Marketing Control Panel > Campaigns > mycrm > 2017 > 01 > 06 > 13 > 35 > Charity event. The 'Charity event' item is selected and highlighted. On the right, the configuration panel for the 'Charity event' is shown. It includes a 'Data' tab, a 'Title' field with the value 'Charity event', a 'Campaign Link [shared]' field with the value 'sc\_camp=DA8571F588DFE311B8E56C3BE5A8B200', a 'Type' field, and an 'Enroll in Engagement Plan' checkbox.

Marketing Control Panel

- Taxonomies
- Goals
- Campaigns
  - mycrm
    - 2017
      - 01
        - 06
          - 13
            - 35
              - Charity event
              - 1Q Regional Events
              - 2Q Regional Events
              - 3Q Regional Events
              - 4Q Regional Events
              - Ad campaign
              - Ad campaign template
              - Ad campaign template (sample)
              - Ad online campaign Adventure Works
              - Ad online campaign Litware

**Data**

Title:

Charity event

Campaign Link [shared]:

sc\_camp=DA8571F588DFE311B8E56C3BE5A8B200

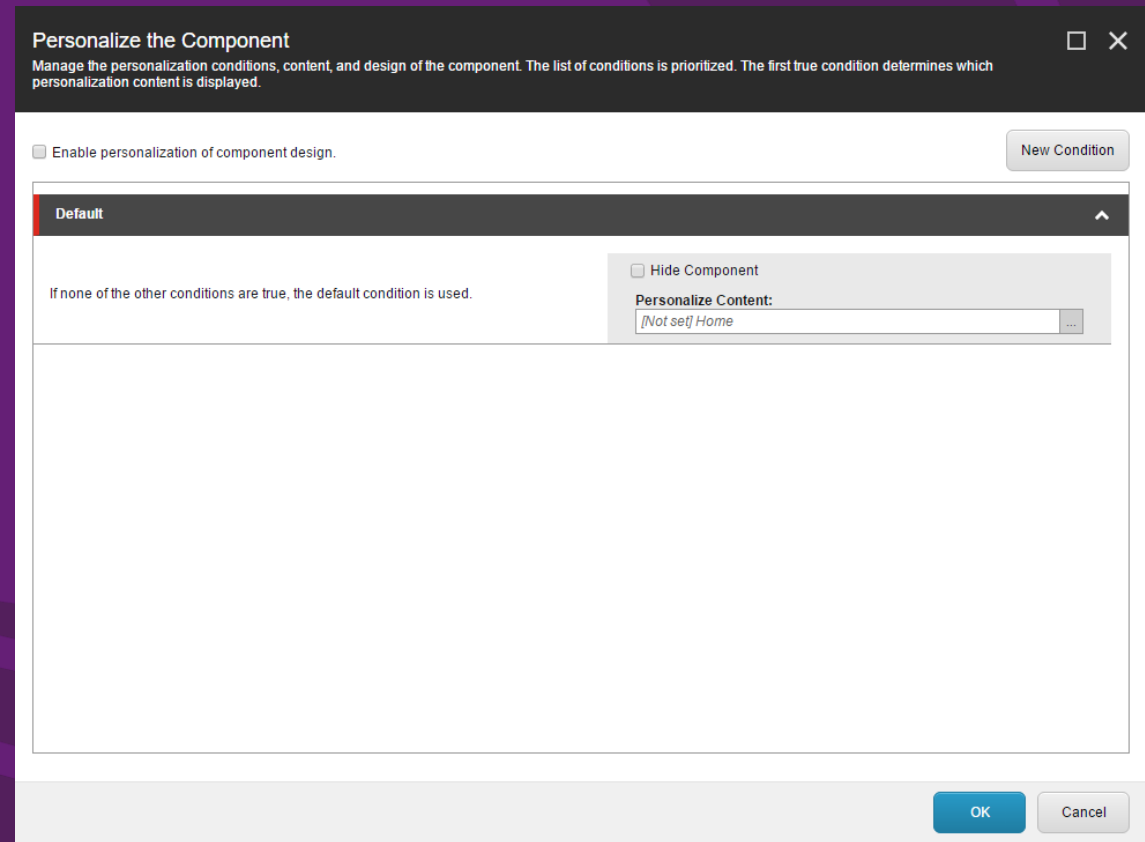
Type:

Enroll in Engagement Plan:

# Scenario 3: Campaign integration

*Add campaign link to url (or assign to Sitecore item).*

Add a new personalization condition.



The screenshot shows the 'Personalize the Component' dialog box. The title bar includes a maximize button and a close button. Below the title bar, a subtitle reads: 'Manage the personalization conditions, content, and design of the component. The list of conditions is prioritized. The first true condition determines which personalization content is displayed.'

Inside the dialog, there is a checkbox labeled 'Enable personalization of component design.' and a 'New Condition' button. Below this is a list of conditions, with the first one selected and titled 'Default'. The 'Default' condition has a sub-section with a 'Hide Component' checkbox and a 'Personalize Content:' field. The 'Personalize Content:' field contains the text '[Not set] Home' and a small button with three dots. At the bottom of the dialog are 'OK' and 'Cancel' buttons.



# Scenario 3: Campaign integration

*Add campaign link to url (or assign to Sitecore item).*

*Add a new personalization condition.*

Select the campaign condition.



Create rule

Choose conditions

campaign

Visit

where the specific campaign was triggered during the current visit

where the specific campaign was triggered during a past or current interaction and when the number of elapsed days compares to number and when the past number of interactions compares to number

where the specific campaign was triggered during a past or current interaction and when the number of elapsed days compares to number and when the past number of interactions compares to number and the custom data compares to value

Edit rule

Specify name...

This rule has no conditions.

OK

Cancel

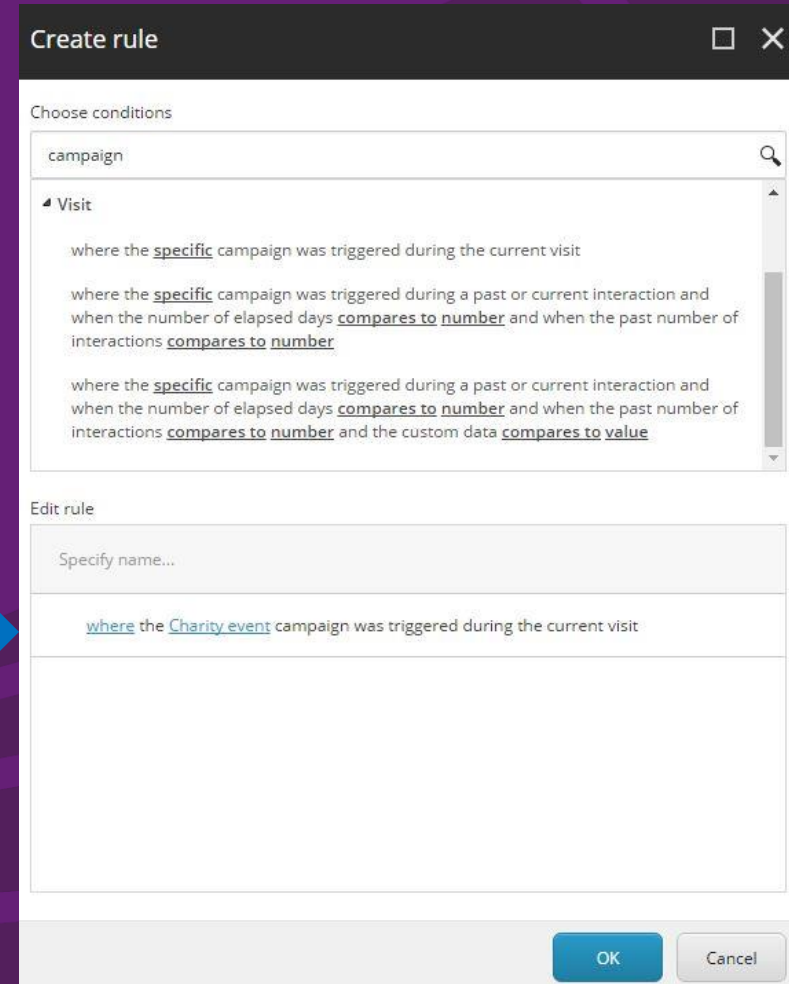
# Scenario 3: Campaign integration

*Add campaign link to url (or assign to Sitecore item).*

*Add a new personalization condition.*

*Select the campaign condition.*

Select a campaign.



Create rule

Choose conditions

campaign

Visit

- where the specific campaign was triggered during the current visit
- where the specific campaign was triggered during a past or current interaction and when the number of elapsed days compares to number and when the past number of interactions compares to number
- where the specific campaign was triggered during a past or current interaction and when the number of elapsed days compares to number and when the past number of interactions compares to number and the custom data compares to value

Edit rule

Specify name...

where the Charity event campaign was triggered during the current visit

OK Cancel

# Resources

<http://integrationsdn.sitecore.net/>