Sitecore Dynamics CRM Connect

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Who am I ?

Solutions Architect Sitecore

Sitecore MVP (2014-2016)

Twitter: @sitecoreclimber

Stackoveflow and stackexchange:
http://sitecore.stackexchange.com/users?tab=Reputation&filter=year
http://stackoverflow.com/users/4616839/sitecore-climber

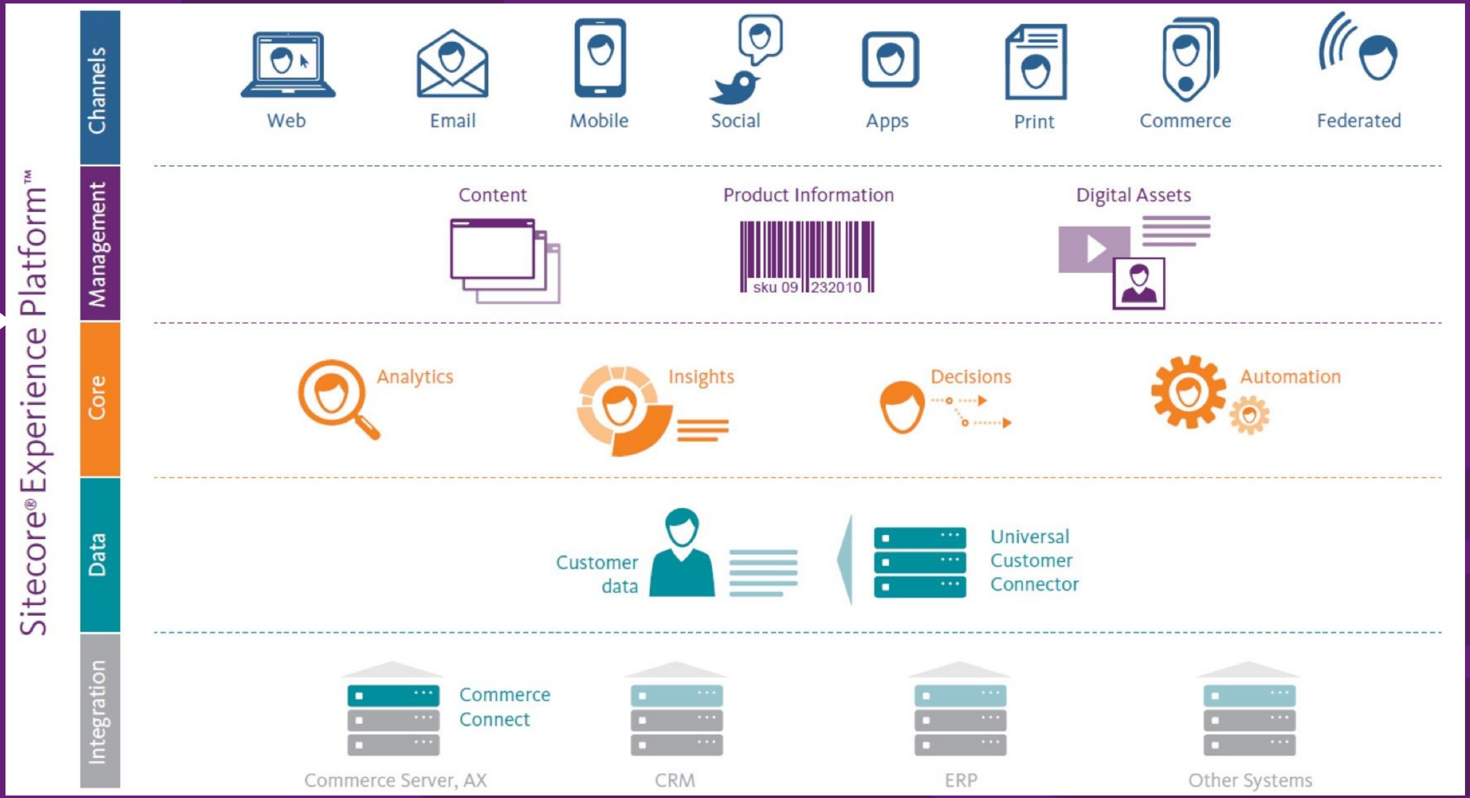
What does a CRM solution do?

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

Sitecore 8.1+

Data Exchange Framework

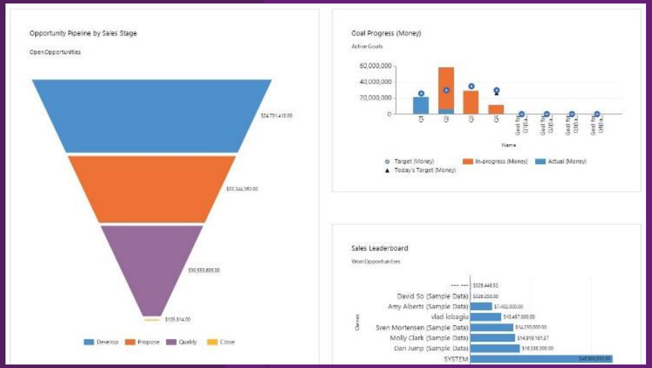
Sitecore Provider

Dynamics CRM Provider

Your custom provider

Bidirectional Synchronization of CRM Contacts and xdb Contacts

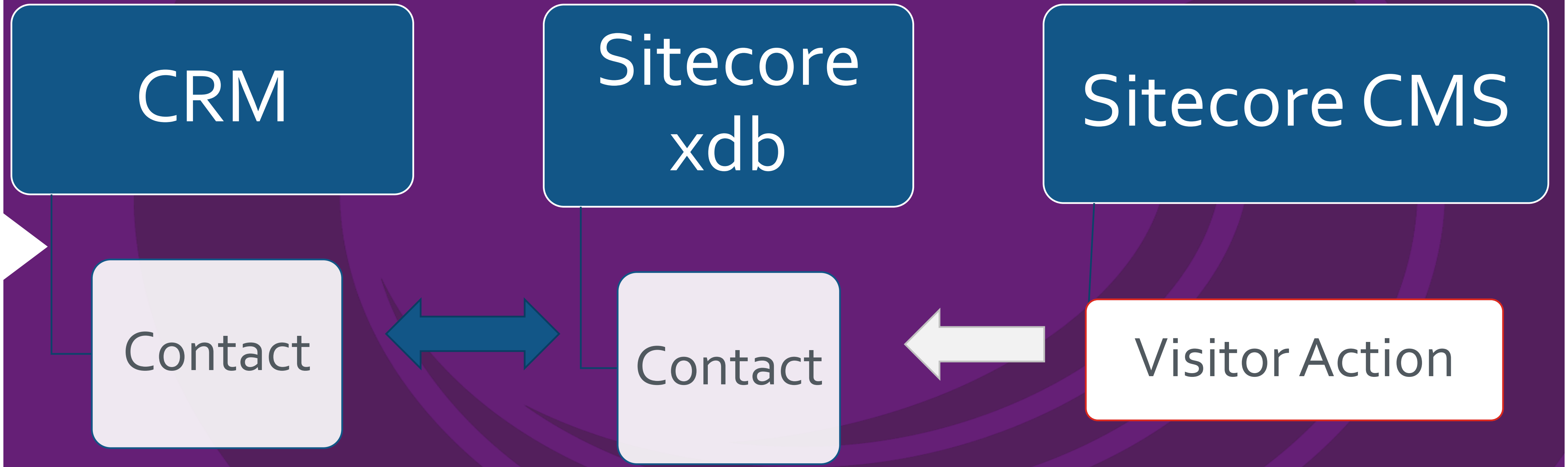
Demo Environment



Dynamics 365

Habitat

Synchronize both directions



Data Flow –Sync Xdb Contact to/from CRM Contact

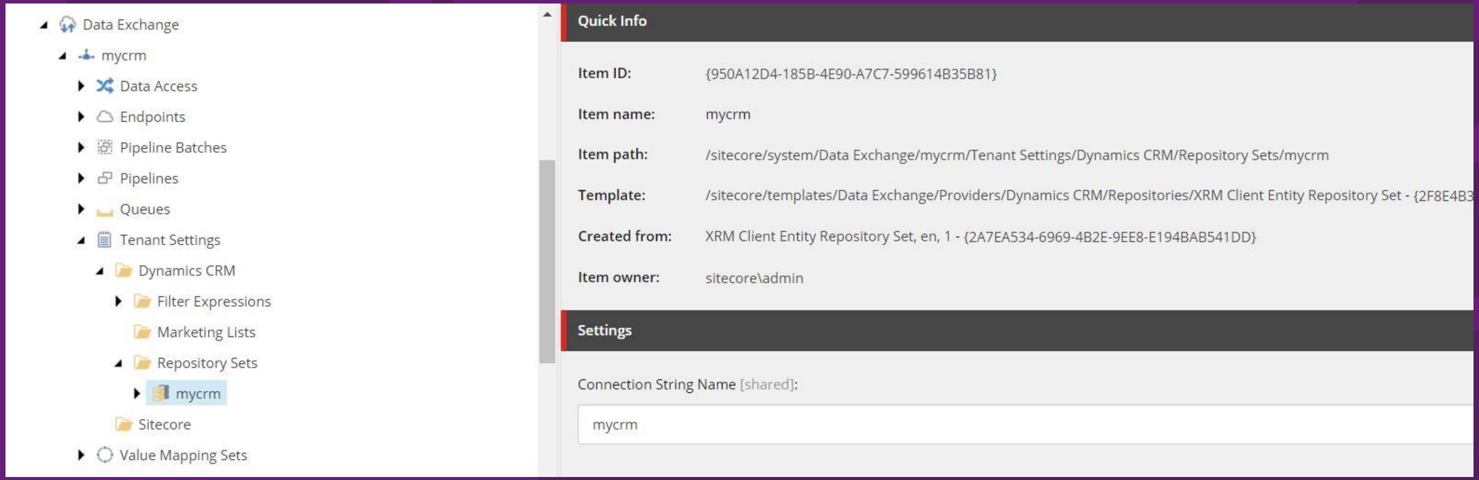
CRM Connect Basic Configuration

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.svc; Organization=dynamicscrmsitecore.onmicrosoft.com; Username=username; Password=password;"/>

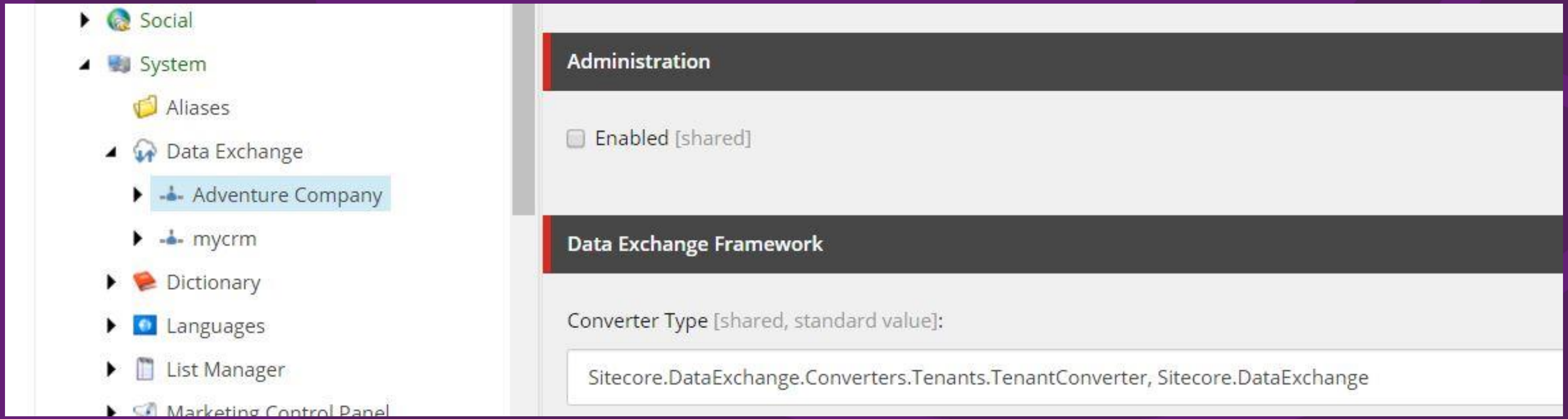
2. Create a Data Exchange Tenant under /sitecore/system/Data Exchange

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

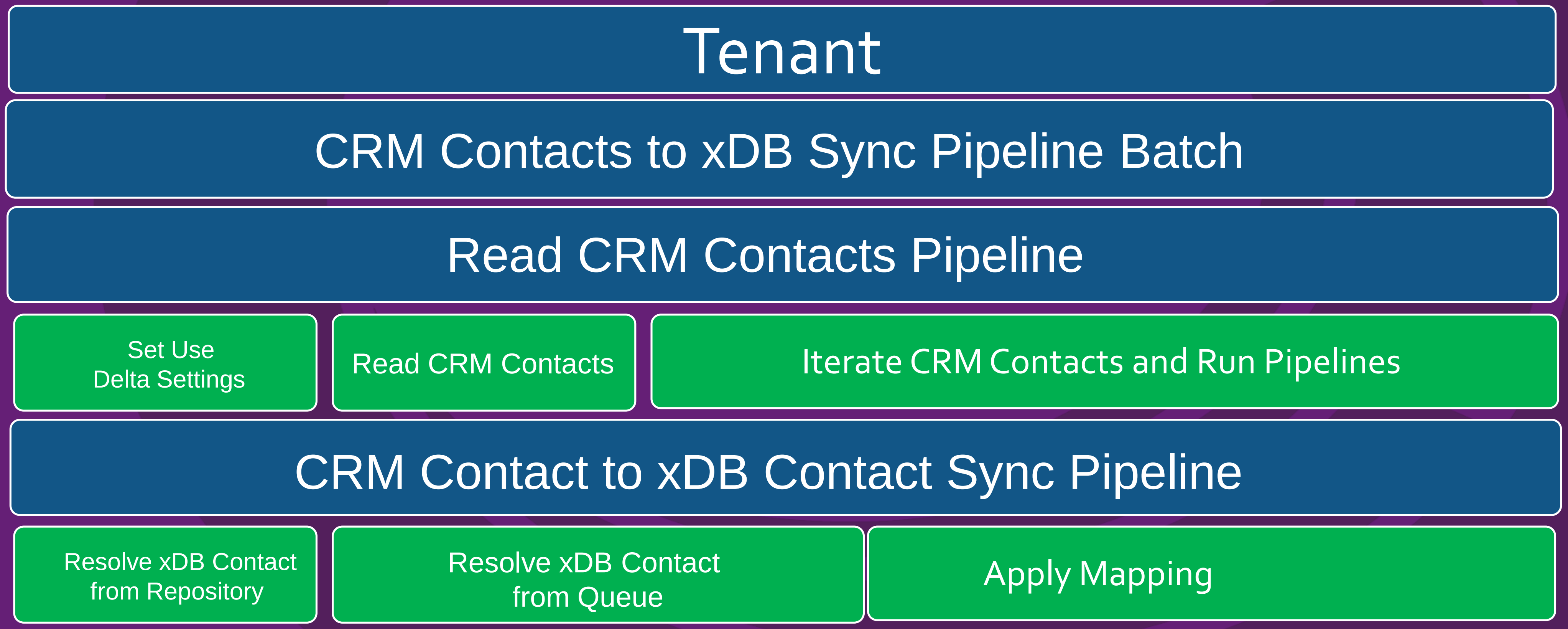


CRM Connect Configuration Basics

- 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



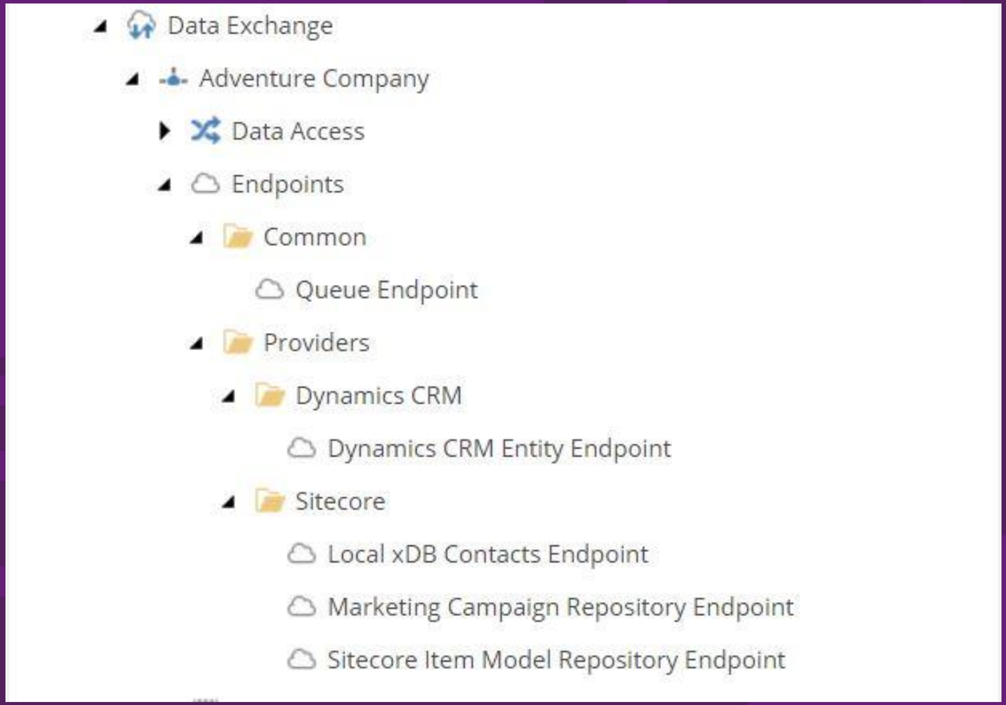
Summary of the Configuration Steps

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

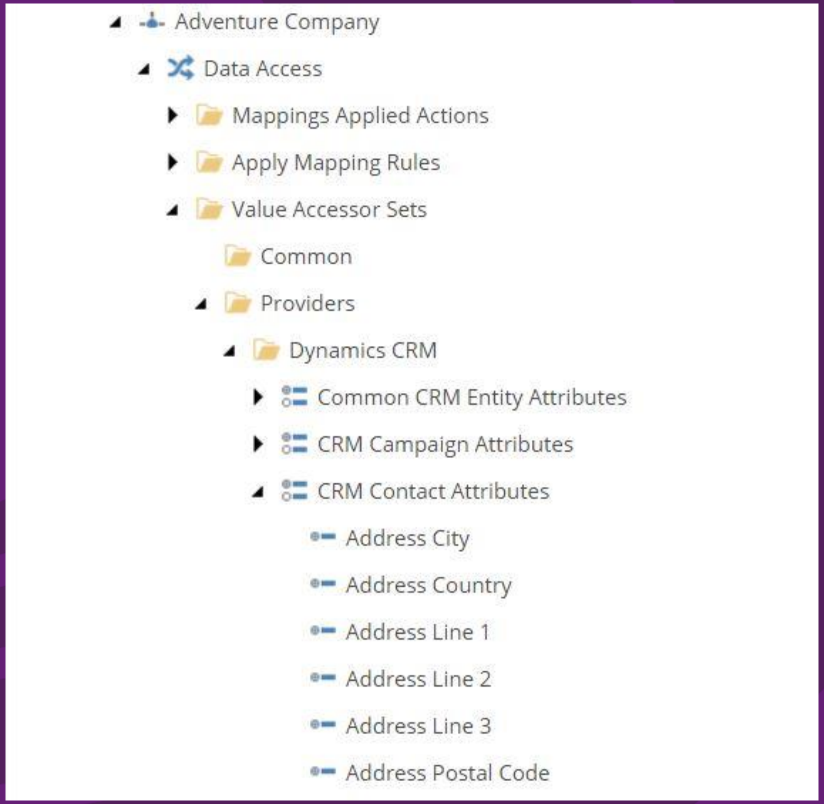


Note: The endpoint does not provide the ability to interact with the data source. It simply represents the data source.

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.

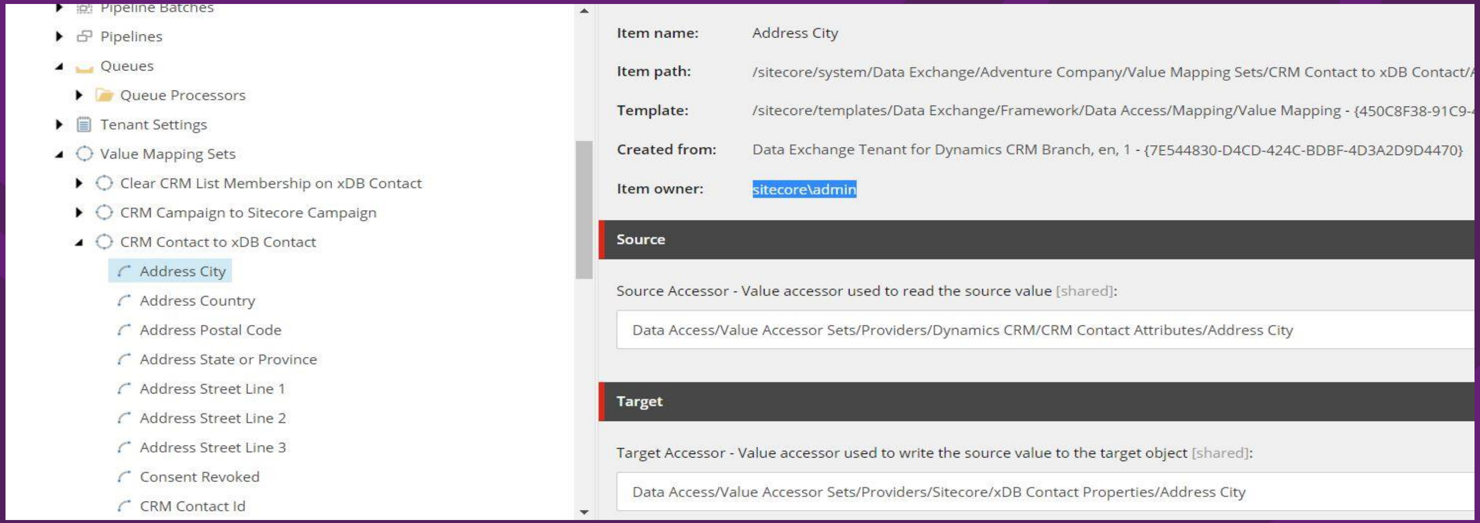
Hint: A value accessor set is like a .NET class. A value accessor is like a .NET property. A value reader is like a property getter. A value writer is like a property setter.



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

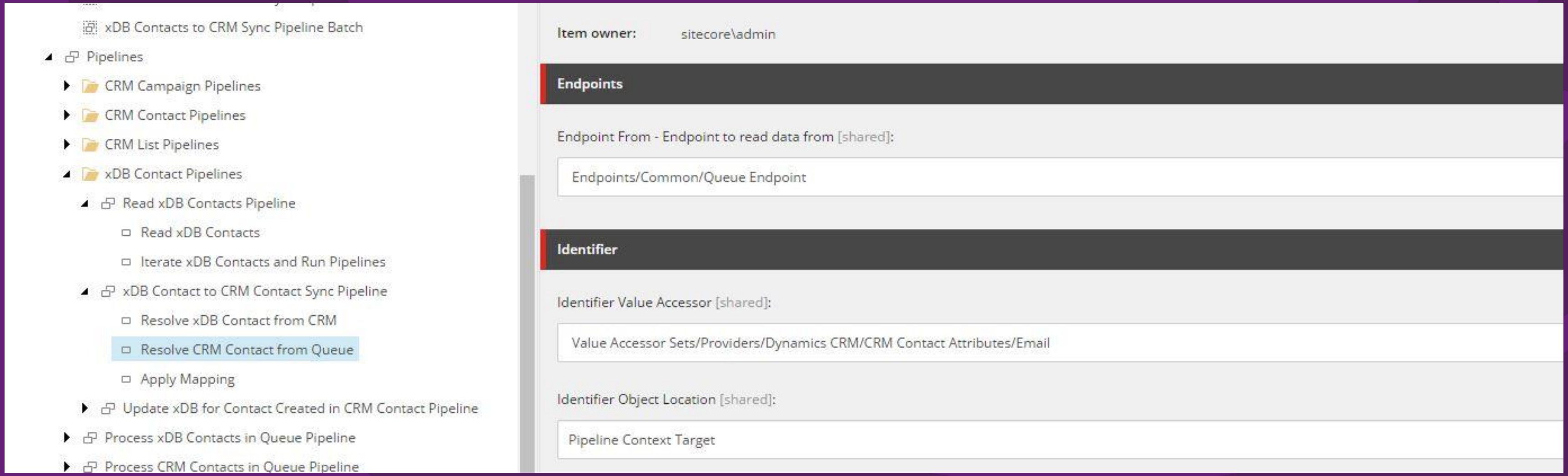


Identifying and Matching Contacts in both Systems

Identifying and Matching of Records in XdB/Dynamics Crm

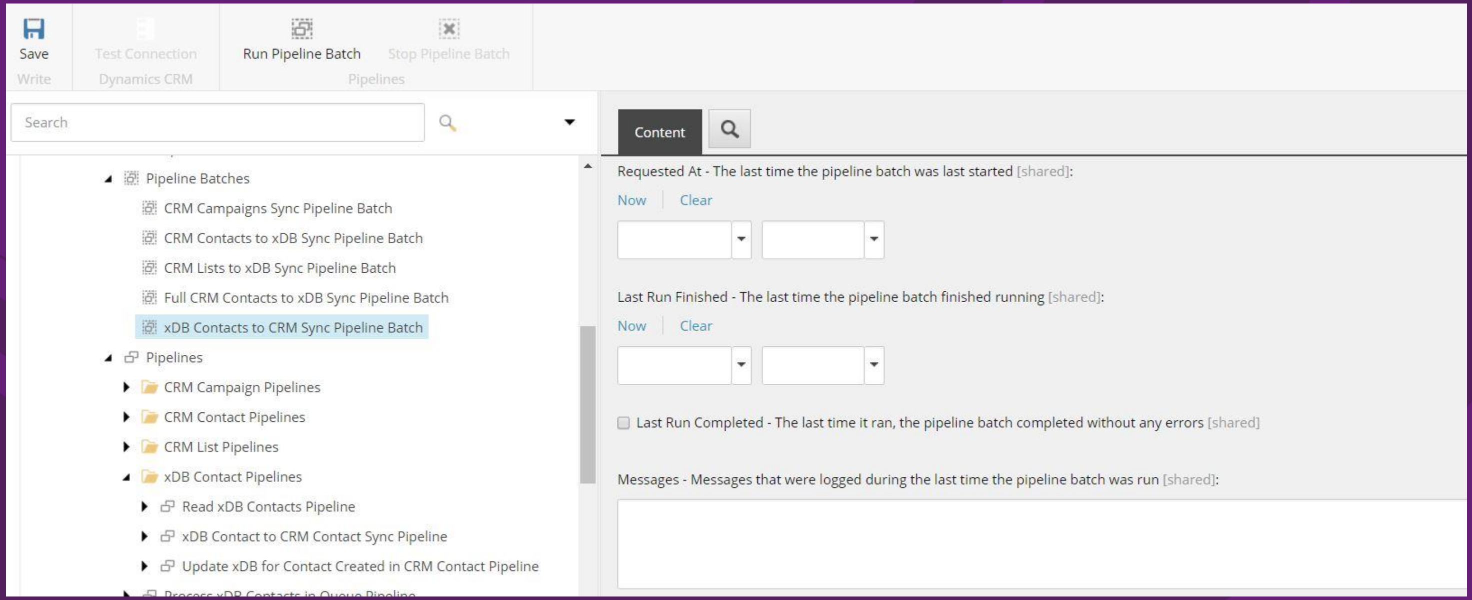
Identity the value on the Dynamics CRM contact you want to synchronize

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.

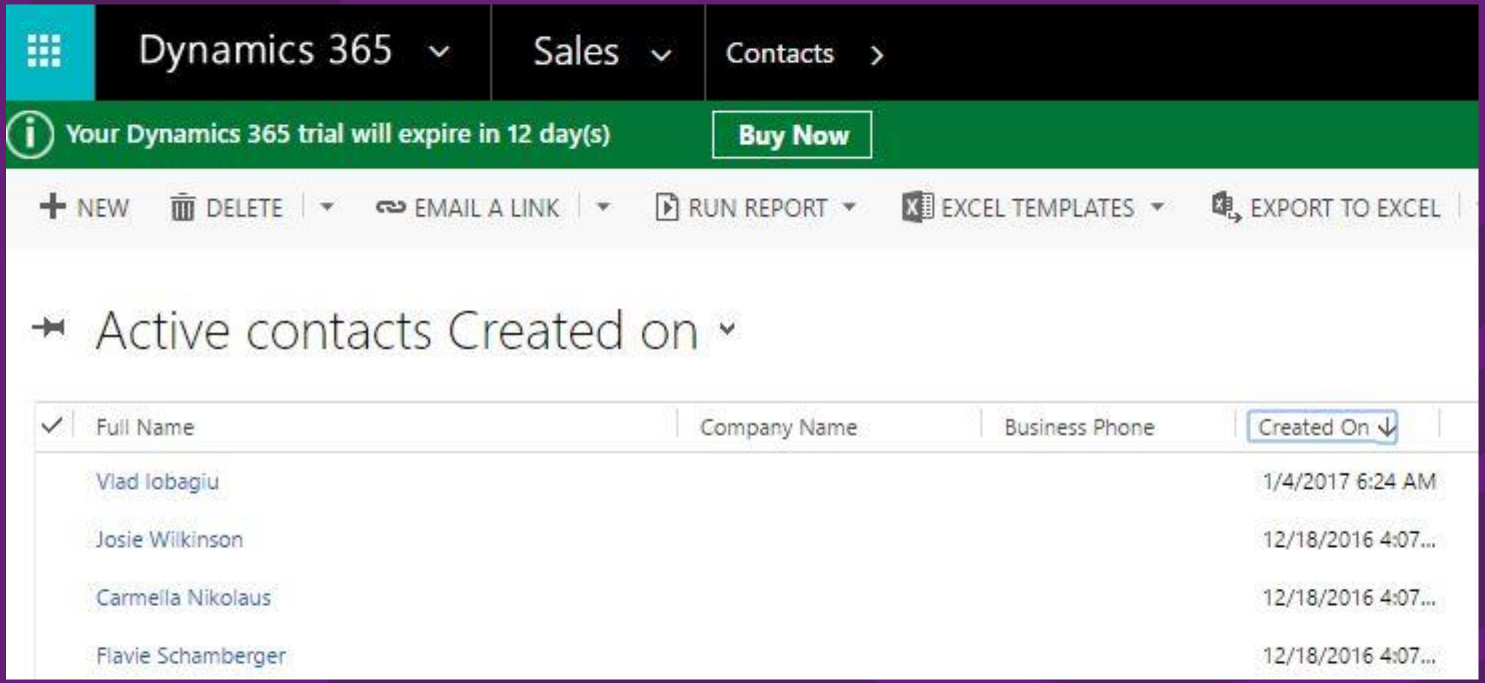


Synchronize xdb Contacts to CRM Contacts

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



Marketer scenarios

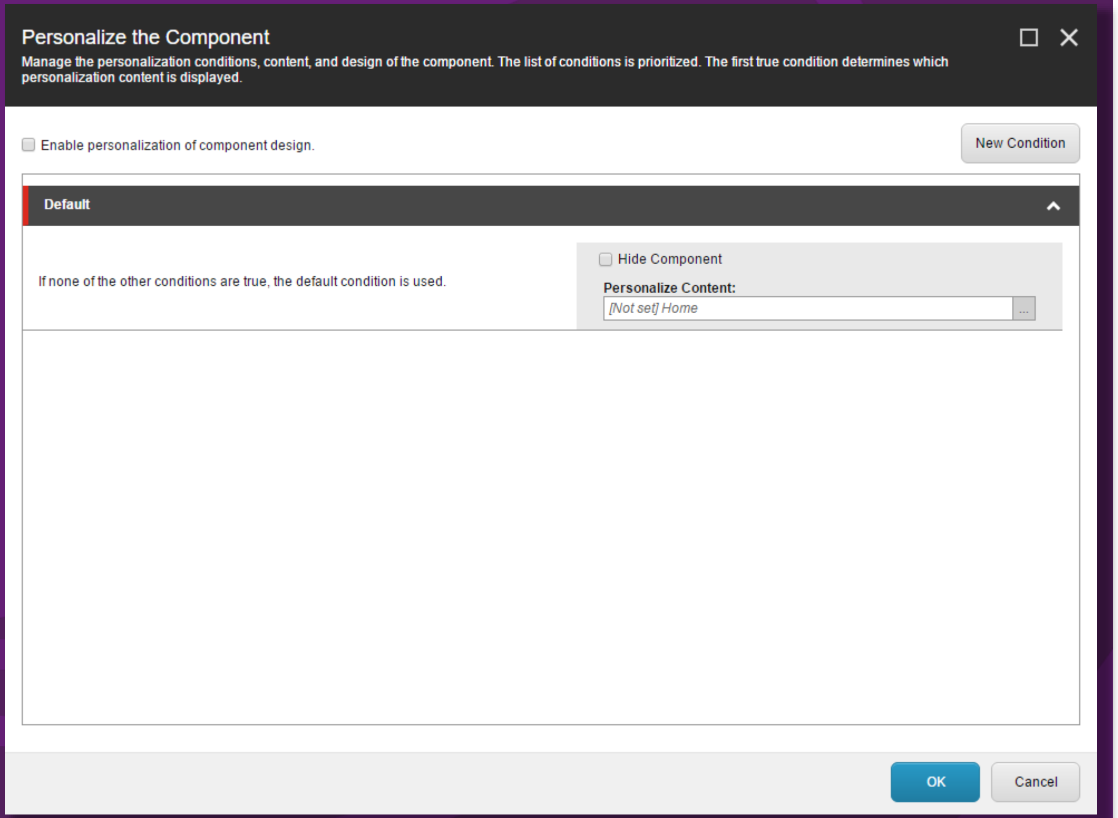
Personalize my site for my contacts using data from CRM

Create segments that combine data from CRM and xDB

Track visitor activity & personalize using campaigns from CRM

Scenario 1: Personalization

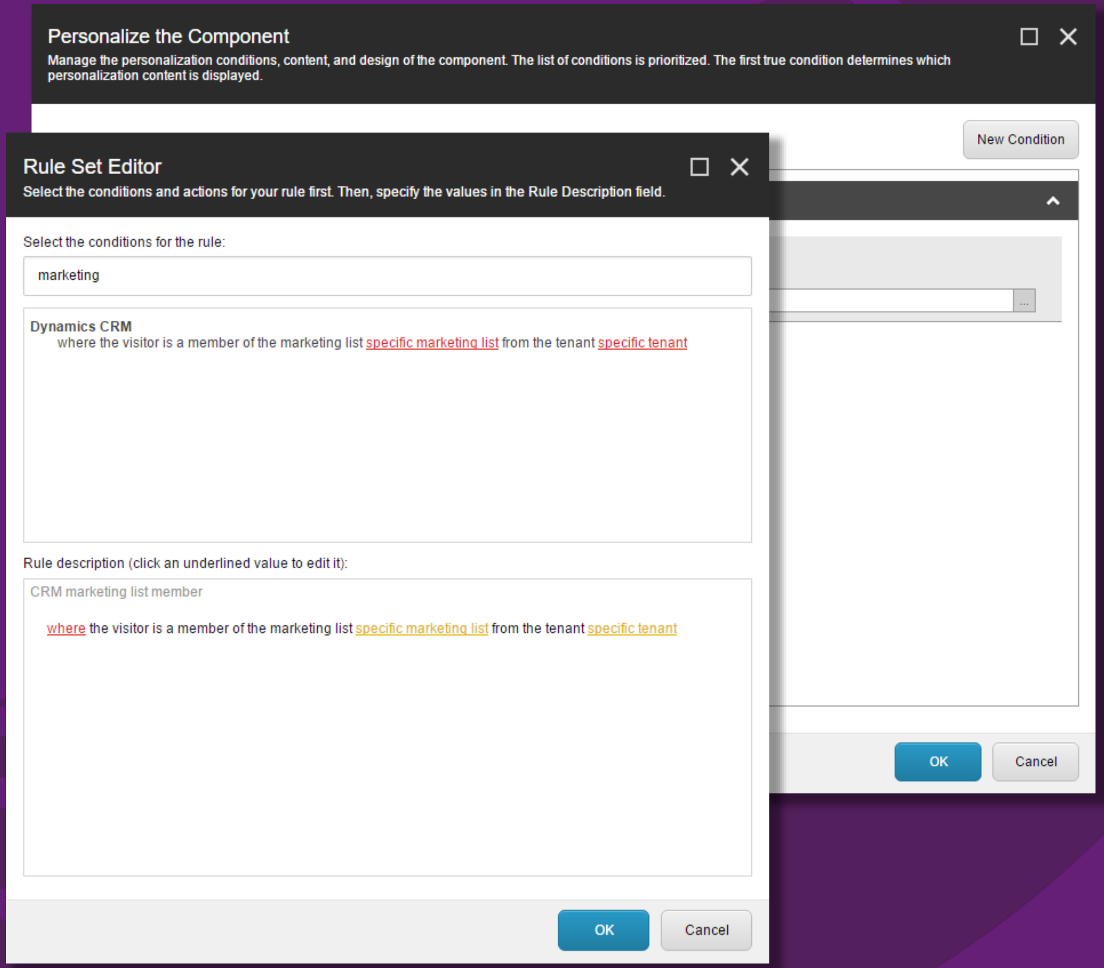
Add a new personalization condition.



Scenario 1: Personalization

Add a new personalization condition.

Select the marketing list condition.

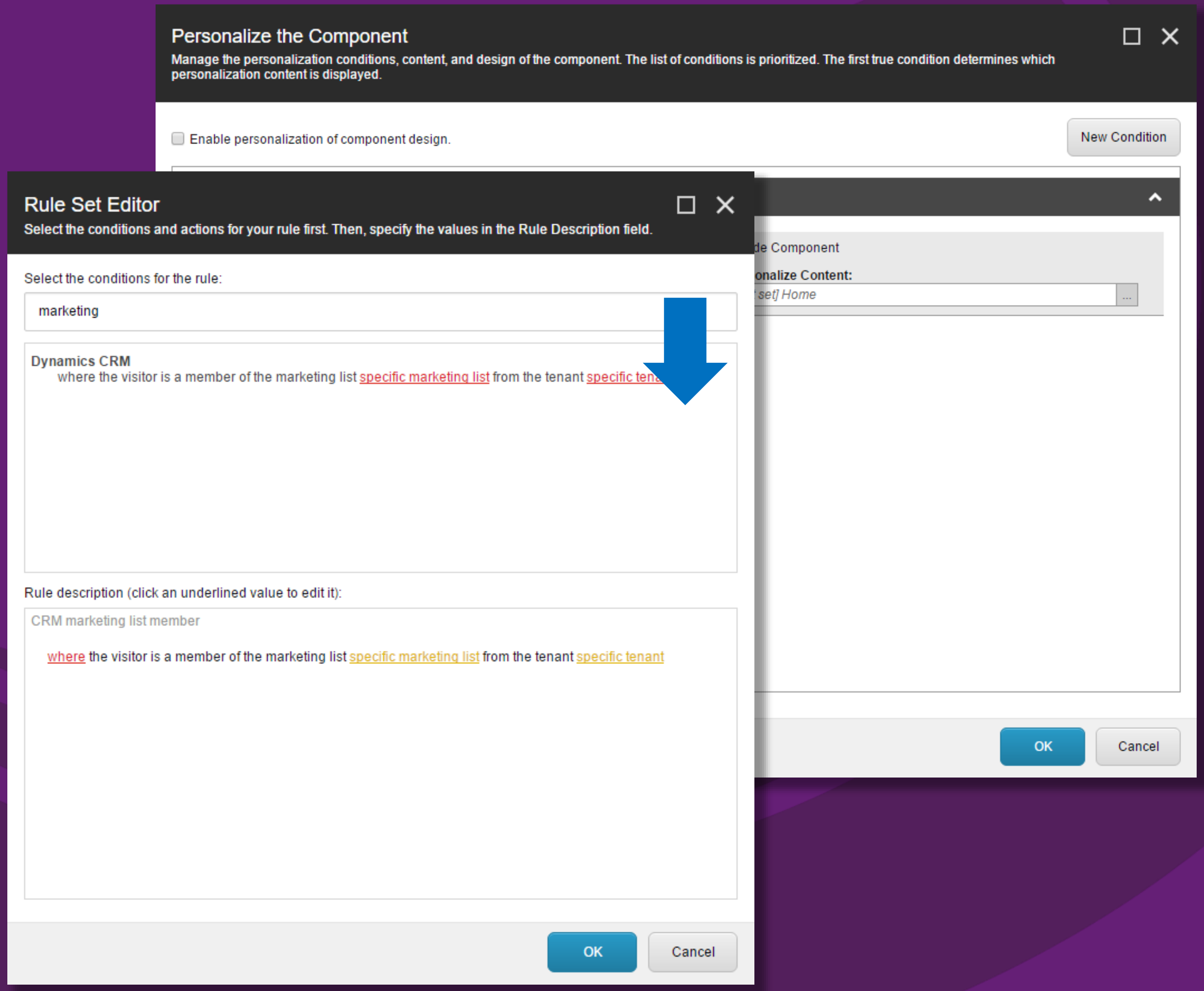


Scenario 1: Personalization

Add a new personalization condition.

Select the marketing list condition.

Select a tenant.



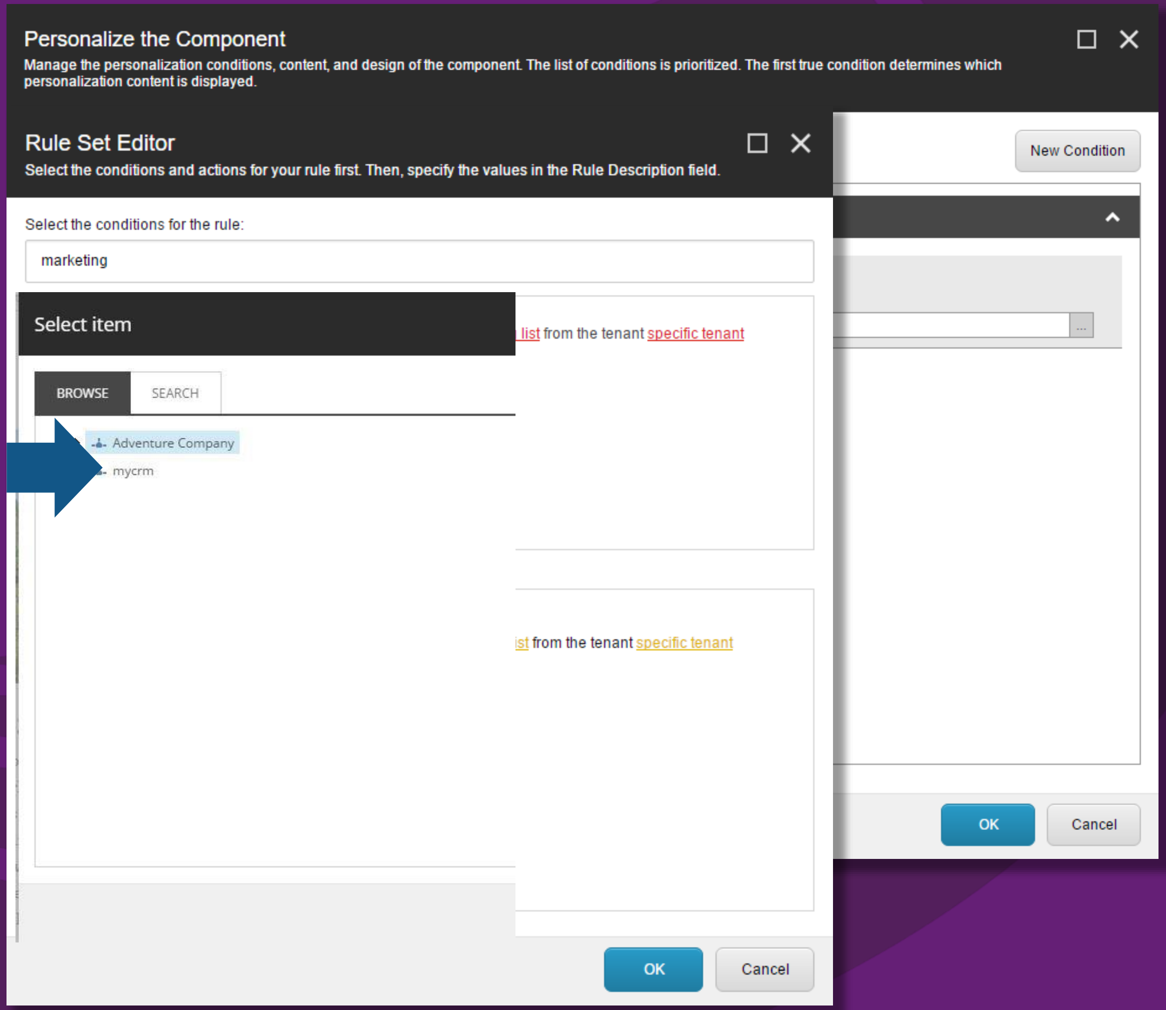
Scenario 1: Personalization

Add a new personalization condition.

Select the marketing list condition.

Select a tenant.

Available tenants are displayed.



Scenario 1: Personalization

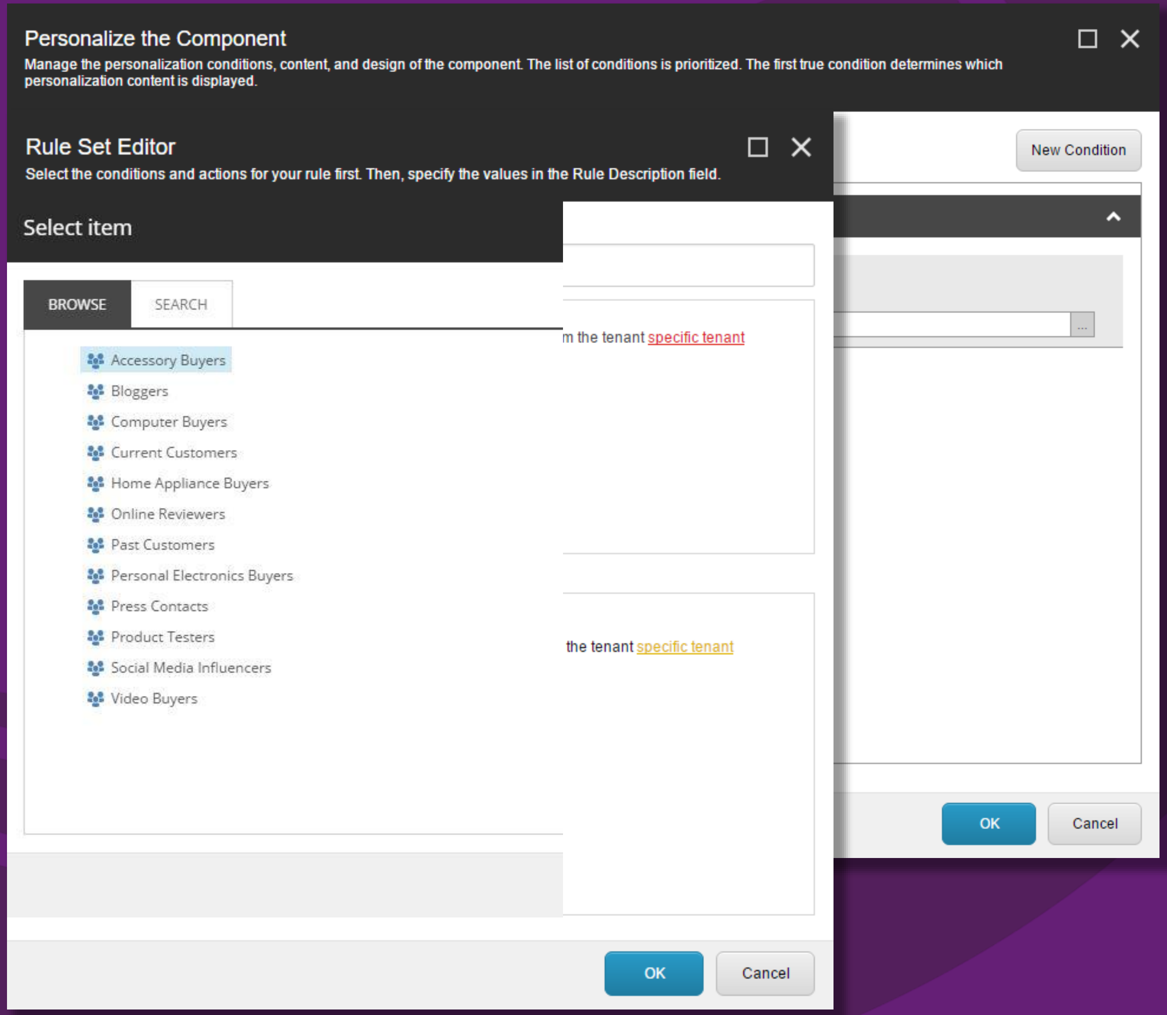
Add a new personalization condition.

Select the marketing list condition.

Select a tenant.

Available tenants are displayed.

Select a marketing list.



Scenario 1: Personalization

Add a new personalization condition.

Select the marketing list condition.

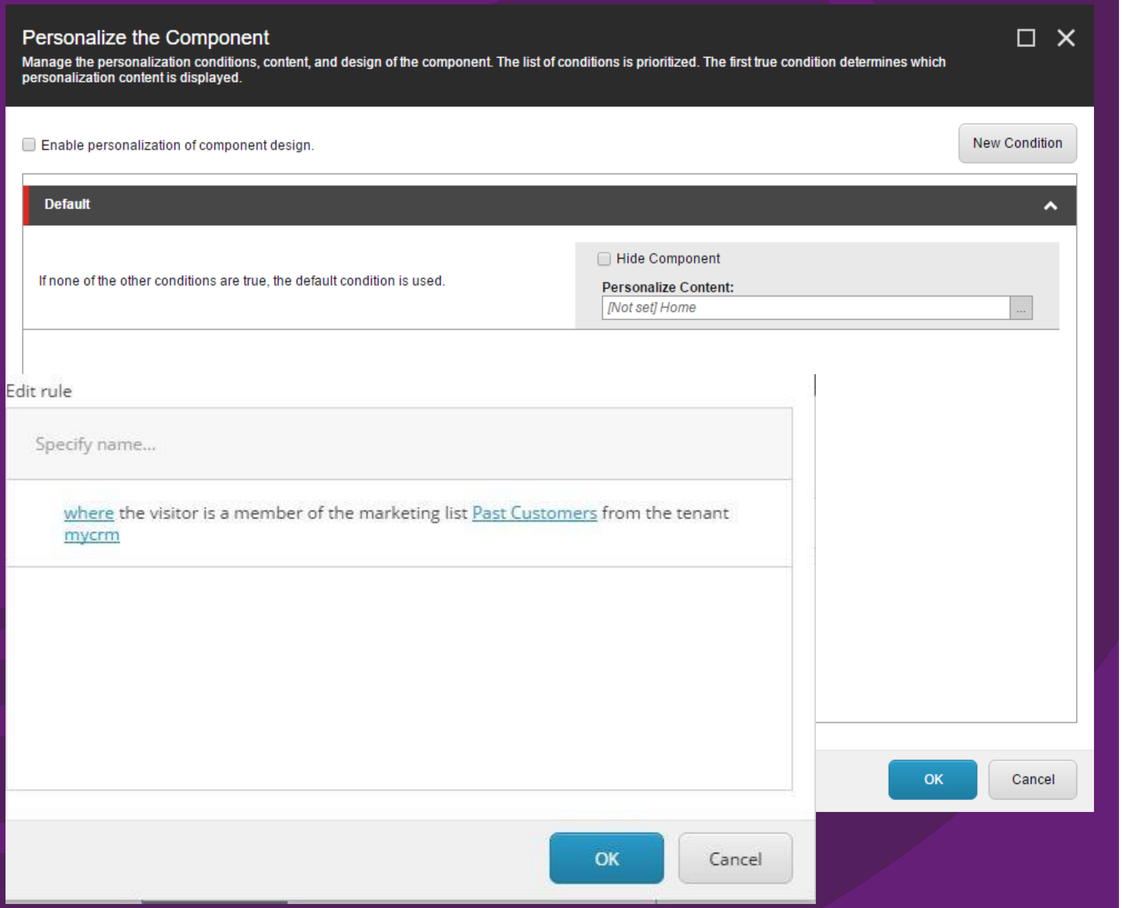
Select a tenant.

Available tenants are displayed.

Select a marketing list.

Available marketing lists are displayed.

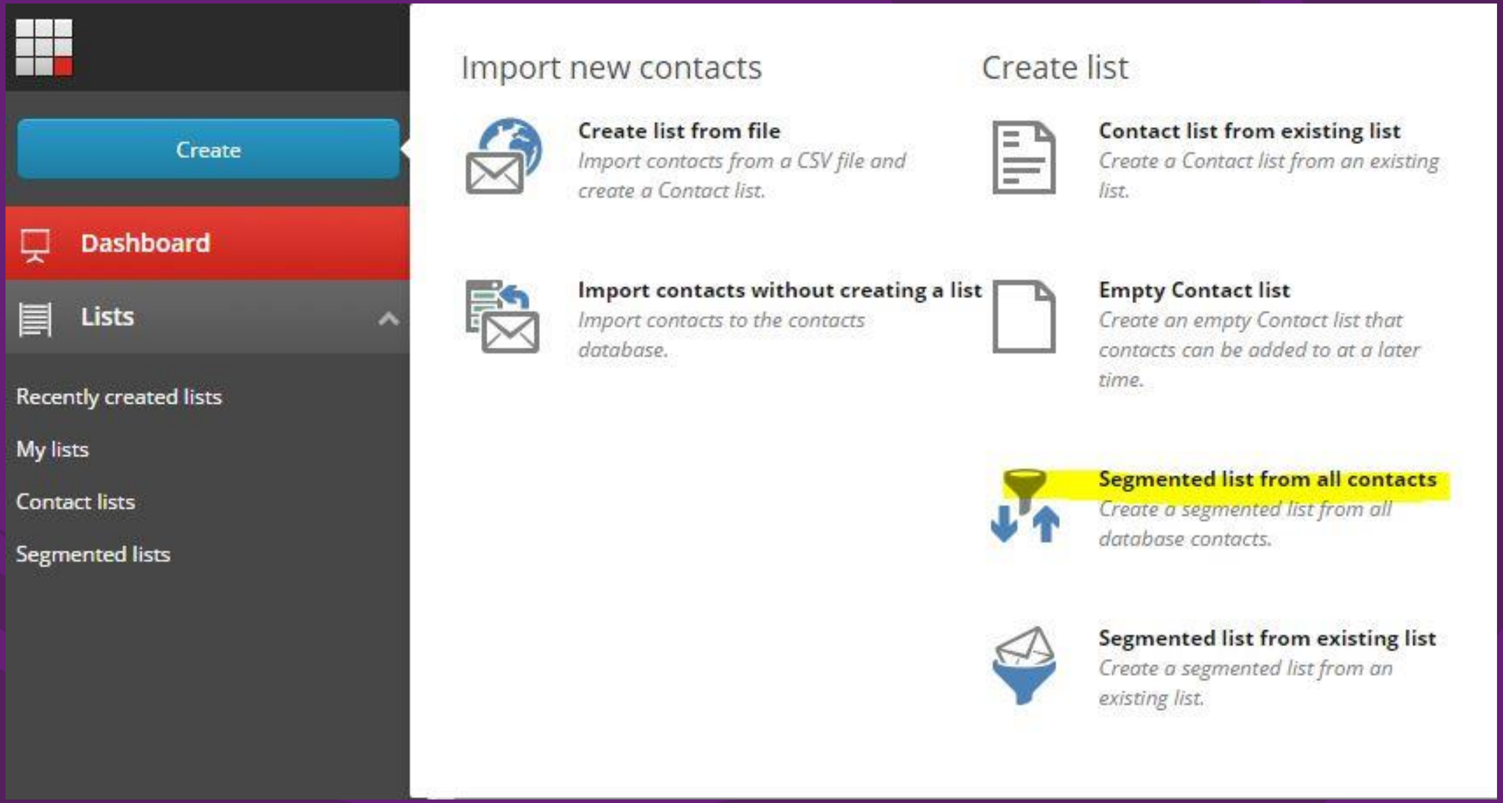
The personalization condition is configured.



Scenario 2 : Segmentation

Open List Manager

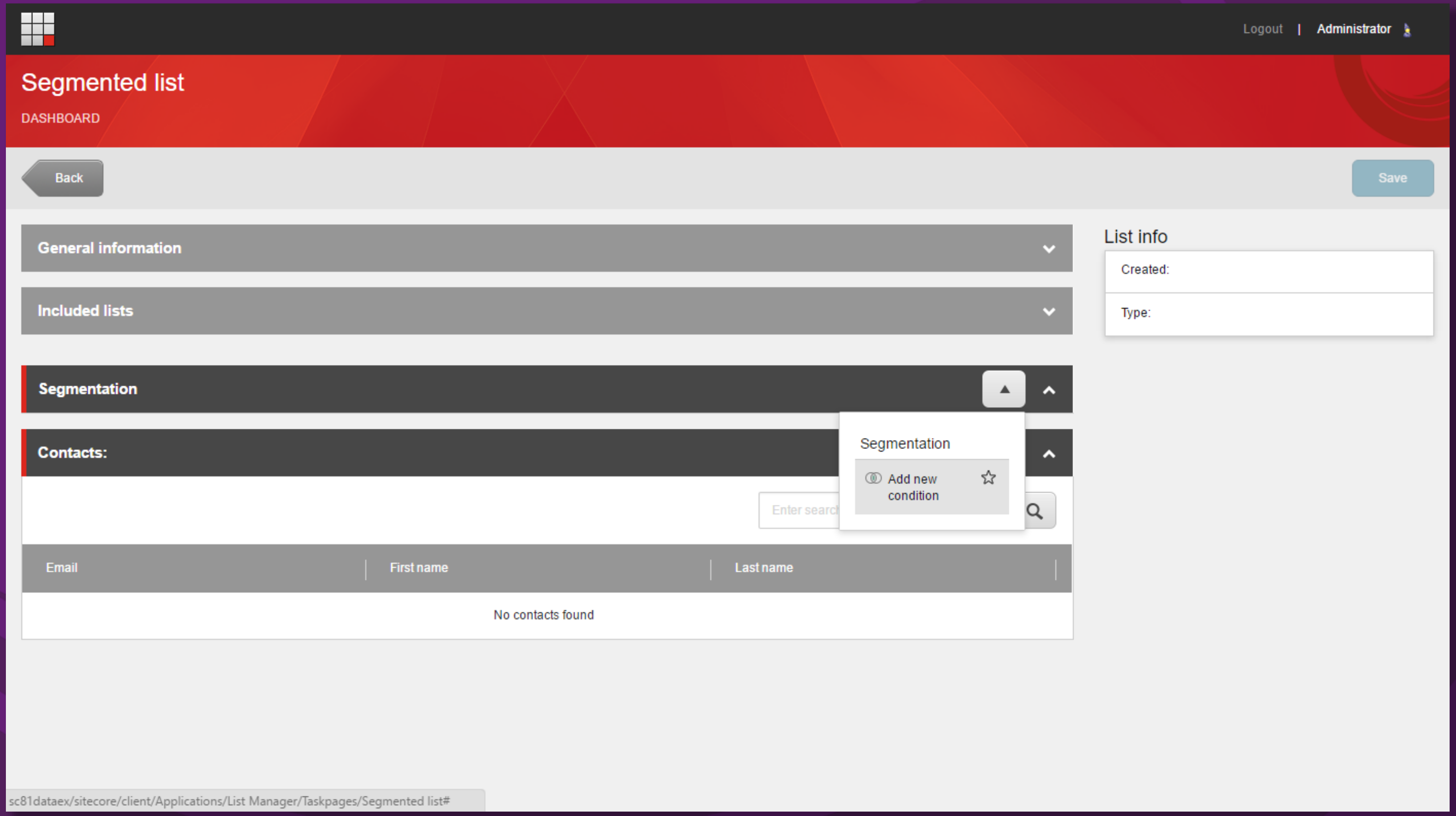
Add a new segmented list.



Scenario 2: Segmentation

Add a new segmented list.

Add a new condition.

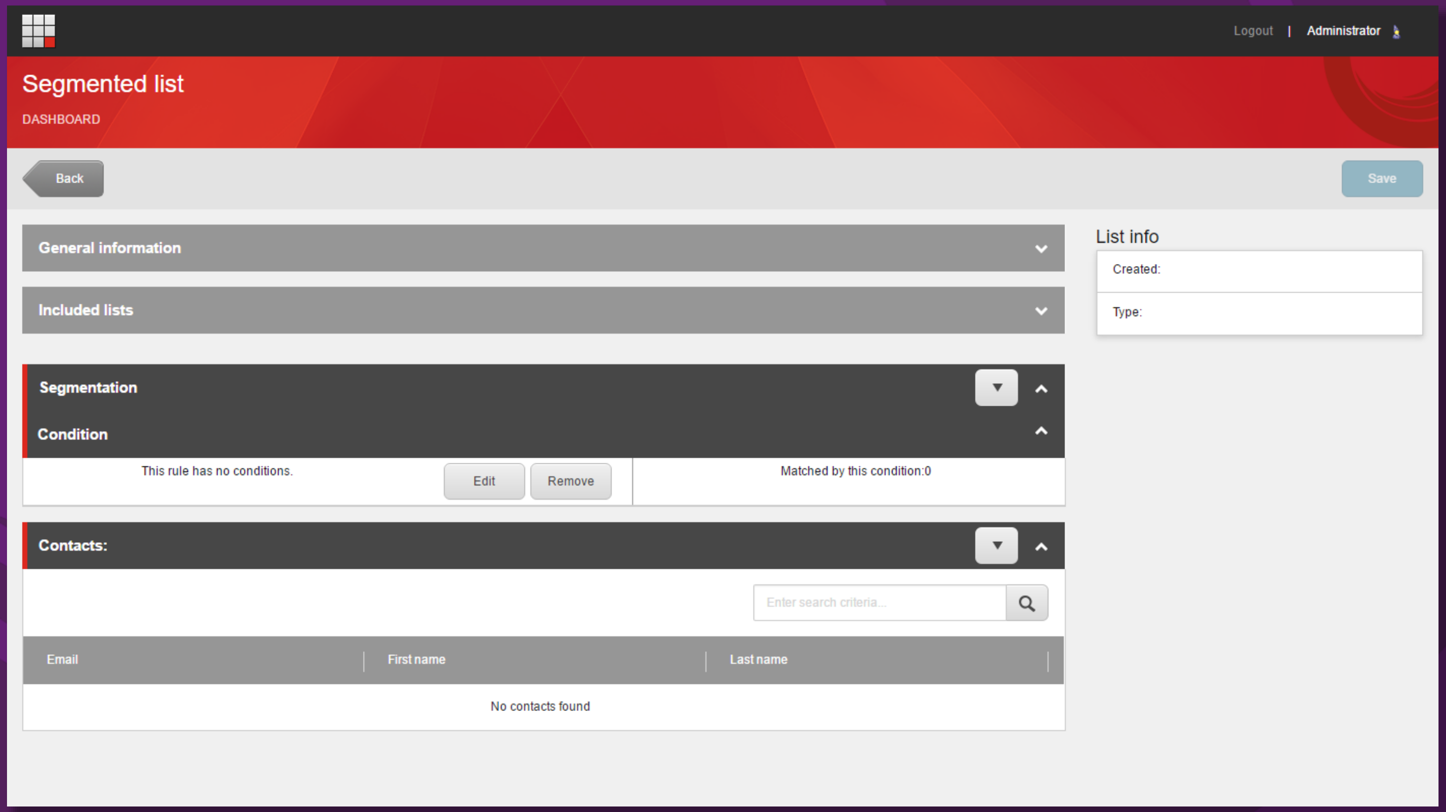


Scenario 2: Segmentation

Add a new segmented list.

Add a new condition.

Edit the condition.



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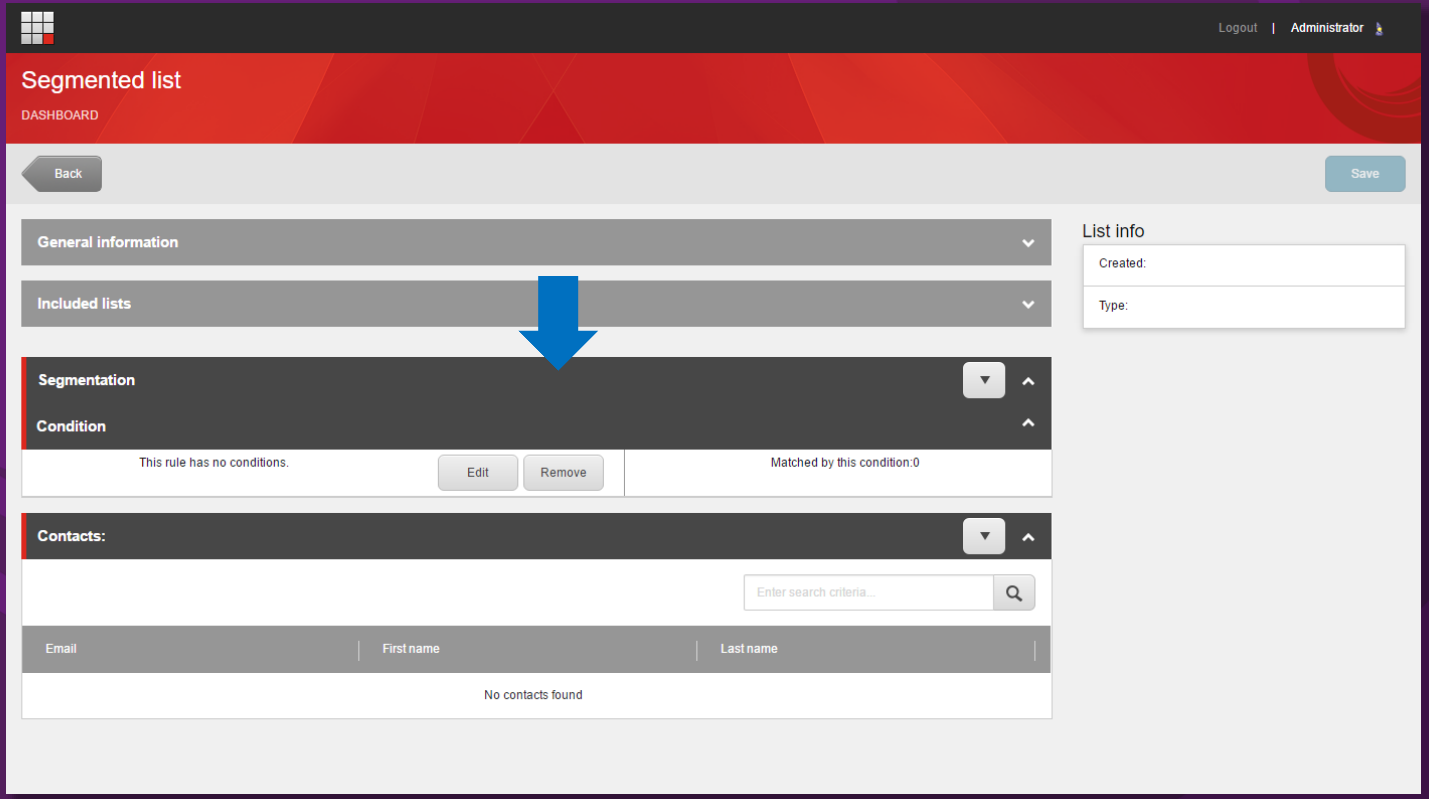


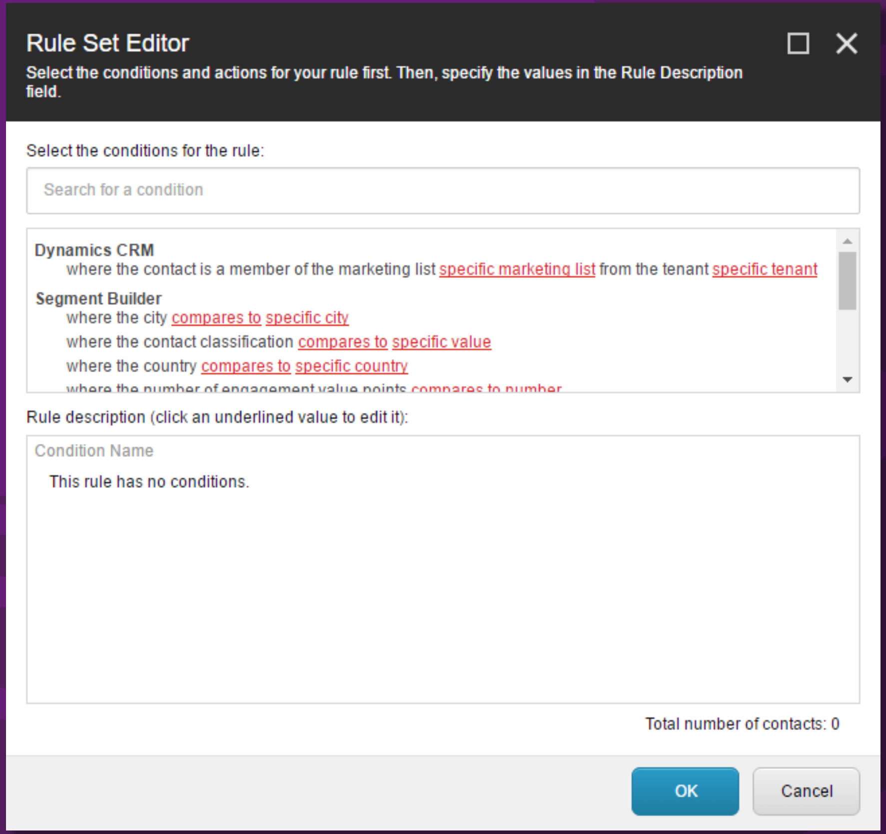
Scenario 2: Segmentation

Add a new segmented list.

Add a new condition.

Edit the condition.

Select the marketing list condition.



Scenario 2: Segmentation

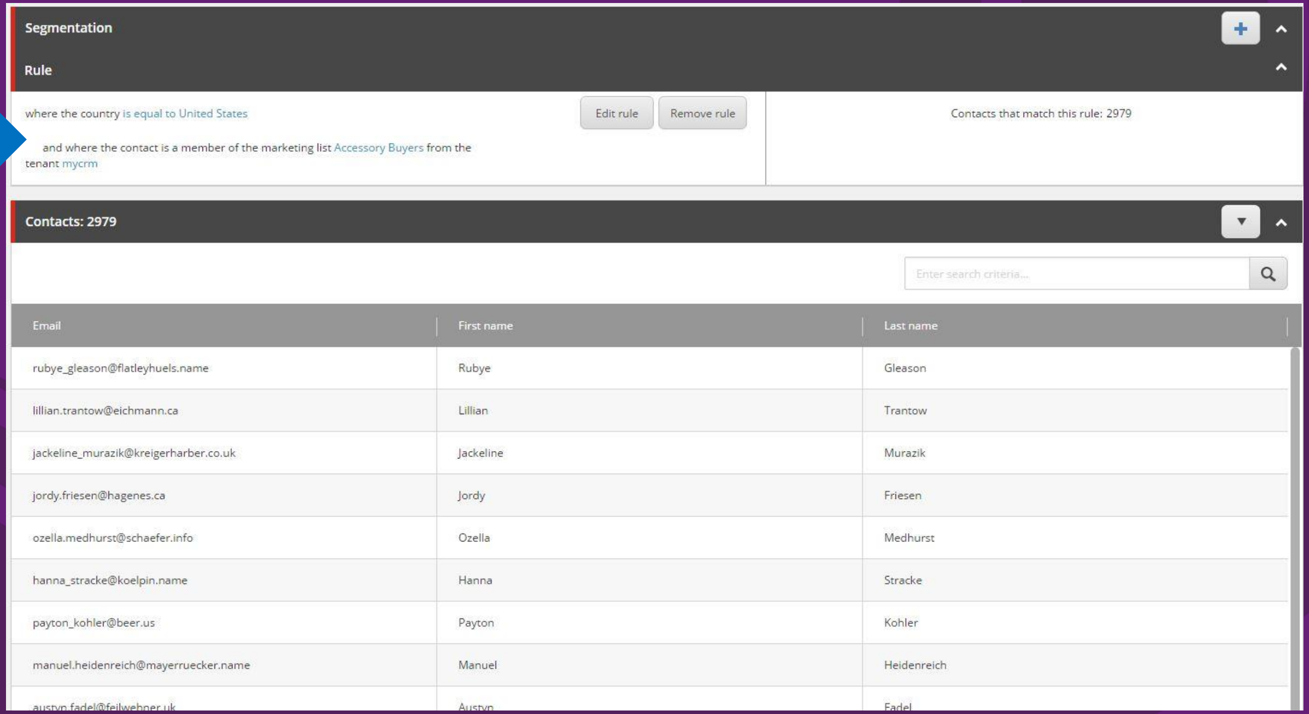
Add a new segmented list.

Add a new condition.

Edit the condition.

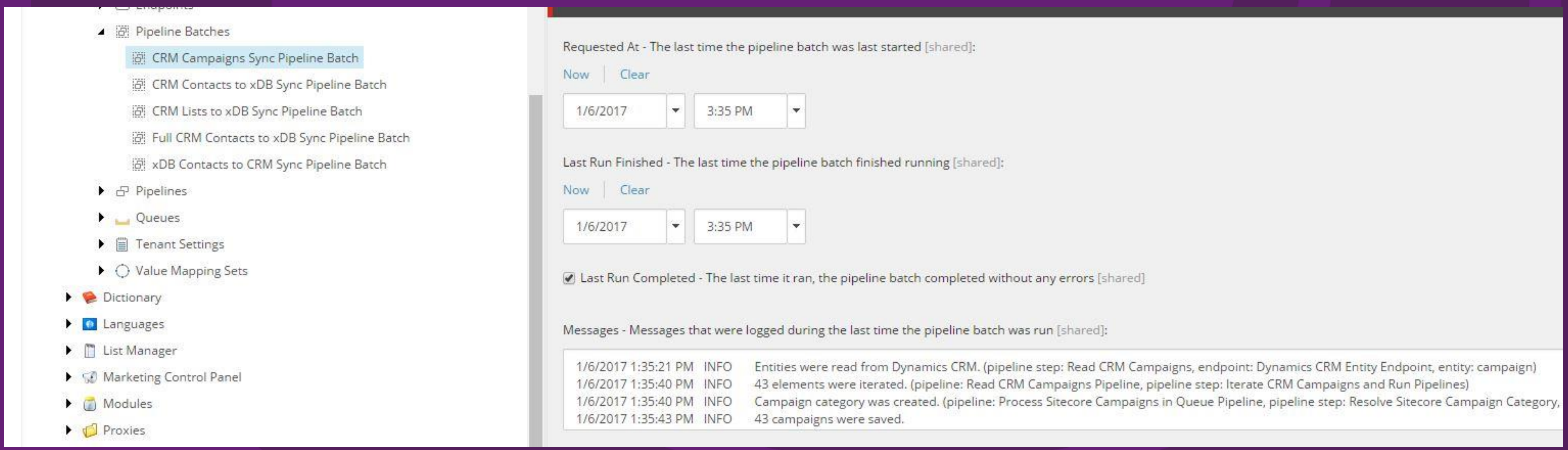
Select the marketing list condition.

Segment list is configured.



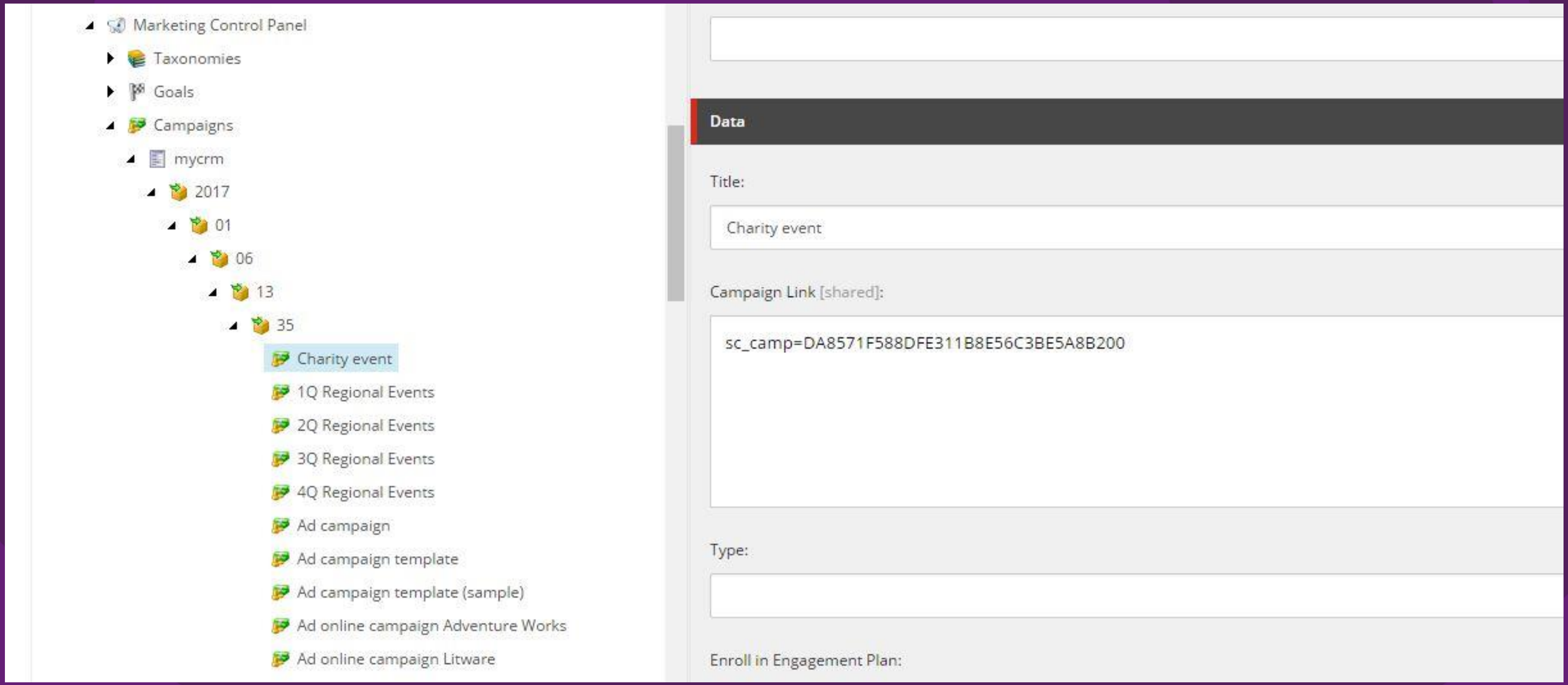
Scenario 3: Campaign integration

Run the pipeline CRM Campaigns Sync Pipeline Batch



Scenario 3: Campaign integration

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



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

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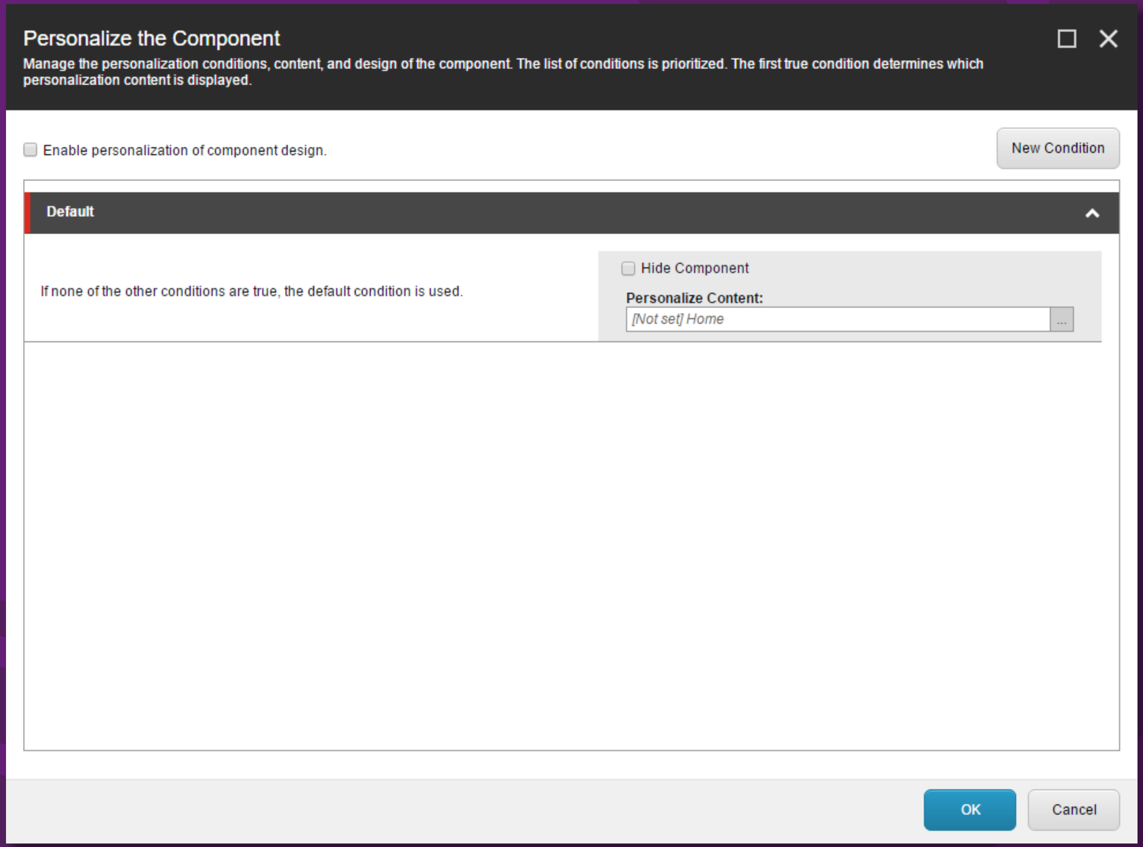

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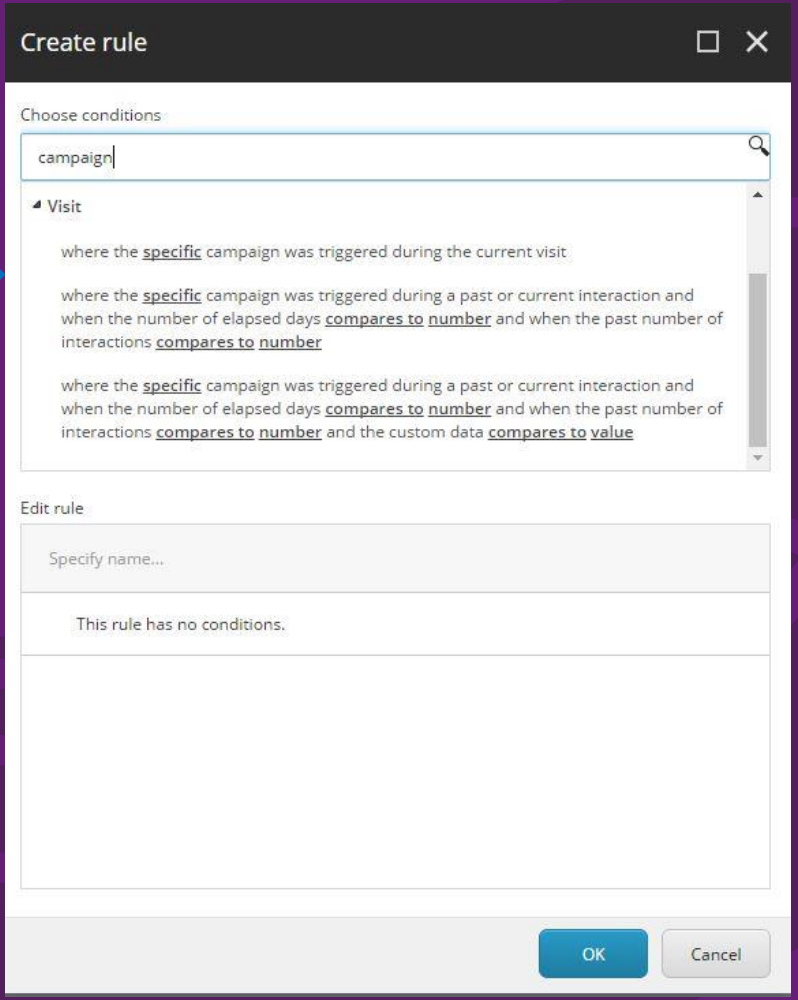

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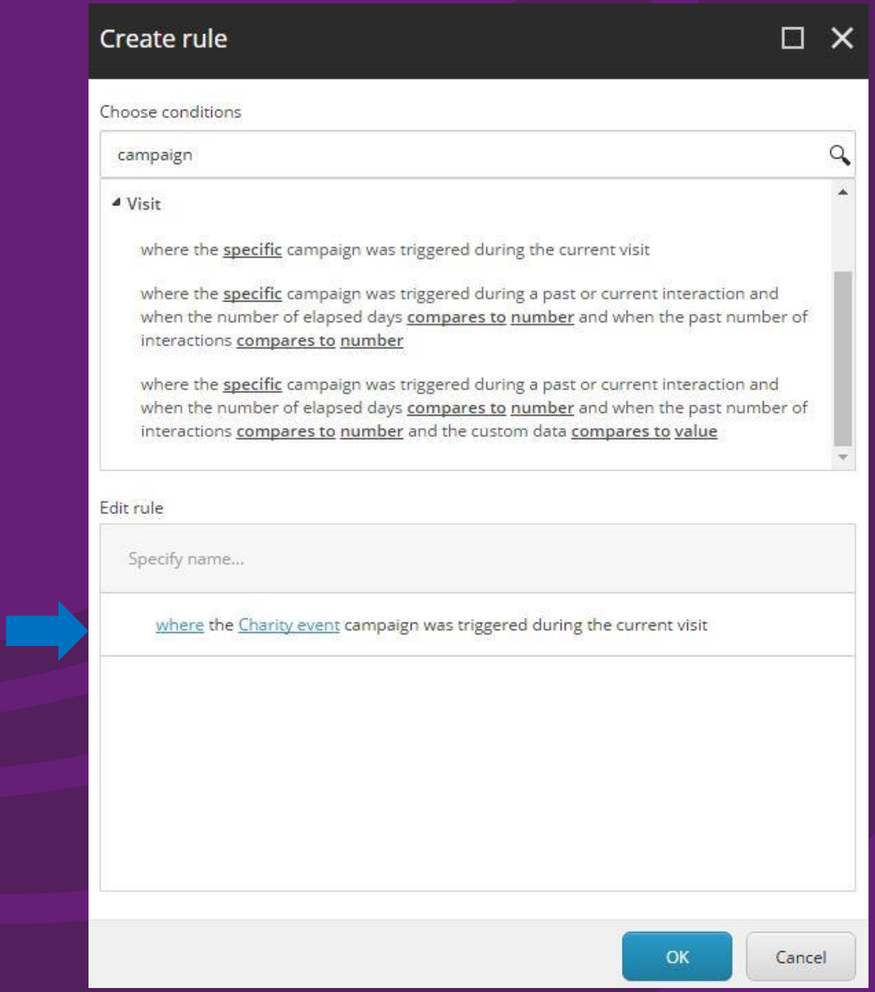
Select the campaign condition.

Select a campaign.



Resources

http://integrationsdn.sitecore.net/