

# Using Microsoft Social Engagement Together with Dynamics CRM

Jukka Niiranen

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# Questions of the day

- What main features does MS Social Engagement (MSE) offer today?
- How can Dynamics CRM customers take advantage of the standard integration to MSE?
- What type of customization opportunities are there for making use of social data inside CRM?



# About me

- Dynamics CRM consultant from Helsinki
- Working at [Digital Illustrated Finland](#)
- Dynamics CRM addict since 2005
- Frequent blogger & #MSDYNCRM evangelist on social media
  - Blog: [survivingcrm.com](#)
  - [@jukkan](#) on Twitter
- Microsoft MVP since 2013



Jukka Niiranen  
[@jukkan](#)

Consultant @ Digital Illustrated  
Microsoft Dynamics CRM MVP



# Topics we'll cover

## MSE basics

- Licensing
- Search topics
- Social profiles
- Analytics
- Social Center
- Activity Map
- Alerts
- Feature roadmap

## CRM integration

- MSE to CRM
- CRM to MSE
- Social profiles
- Social activities
- MSE Link-to-CRM
- Record creation rules
- Channel properties
- Current limitations

## CRM customization

- Mobile
- Dashboards
- Custom entities
- Workflows
- Navigation
- Search
- Entity images
- External profiles

# Brief History of MSFT Social





# MSFT & Social in 2011: CRM team's vision

**DIGITAL  
ILLUSTRATED**  
DESIGN TECHNOLOGY SUCCESS

**FUSELABS** Microsoft®

File Dashboards

Save As New Edit Delete Set As Default Share Dashboard Assign Refresh All Advanced Find

Microsoft Dynamics CRM

Eric Boocock @  
Proseware, Inc.  
Sign Out

Dashboard Management Action Query

Workplace

My Work Dashboards Vibe Get Started Activities Calendar Imports Duplicate Detection Queues Articles PowerFind Parrot Reports Announcements

Customers Accounts Contacts

Workplace Sales Content Management Marketing Service Settings Pulse Resource Center

Dashboard: Social Activity

Microsoft Dynamics CRM Social Activity

UKsNum1MSCloud RT @mscrmonline: A must read resource for those of you currently evaluating #Microsoft #Dynamics #CRM Online http://t.co/ZxrFzPzL #msdynncrm #crm2011 #cloud 10 hours ago · reply · retweet · favorite

CRMcomparison Risks of purchasing an industry-specific vs a customized CRM solution

Buzz on Twitter>> CRM ERP

3 days | day | hour

Jul 31 Aug 1 Aug 2

Get a SocialGadget Microsoft FUSE Labs

Microsoft Dynamics ERP Social Activity

MSFTDynamicsERP RT @msdynamicsax: Microsoft Dynamics AX 2012 is now on the market - http://t.co/ReeZnOI #msdynax #erp #AX2012 yesterday · reply · retweet · favorite

MSFTDynamicsERP RT @msdynamicsax: Hold the Date for the AX Technical Conference 2011, Fall Edition (in Nice, France) - http://t.co/WwiVDeI #msdynax #erp #AX2012 yesterday · reply · retweet · favorite

msdynncrm

worldwide #msdynncrm #msdynncrm #arm Microsoft CRM Cloud Microsoft

3 days | day | hour

Jul 31 Aug 1 Aug 2

Get a SocialGadget Microsoft FUSE Labs

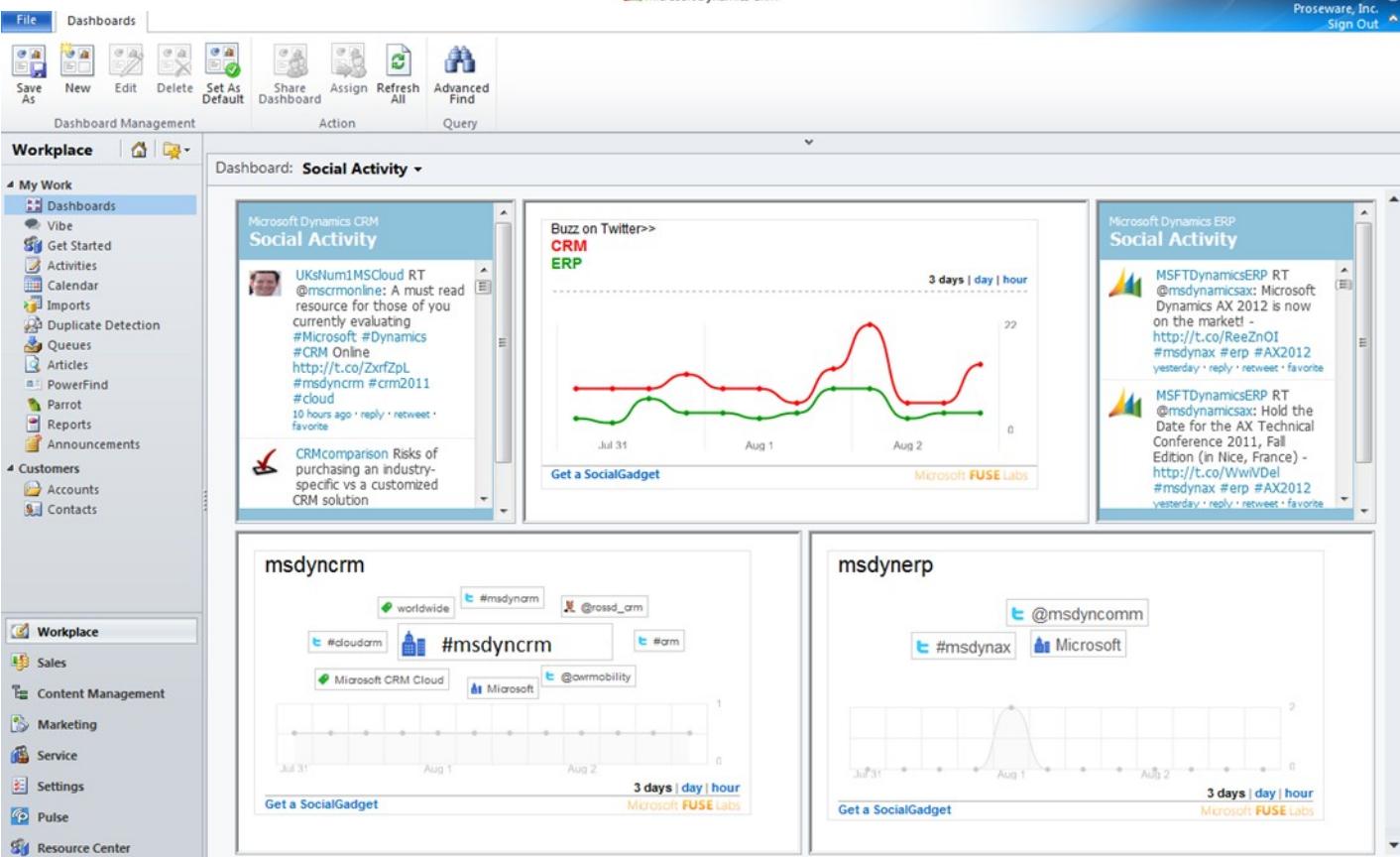
msdynerp

@msdyncomm #msdynax Microsoft

3 days | day | hour

Jul 31 Aug 1 Aug 2

Get a SocialGadget Microsoft FUSE Labs



<http://>

[www.slideshare.net/lauraannerobinson/building-your-business-hub-microsoft-dynamics-crm-and-social-technologies](http://www.slideshare.net/lauraannerobinson/building-your-business-hub-microsoft-dynamics-crm-and-social-technologies)



# MSFT & Social in 2011: SQL team's vision

MICROSOFT

CODENAME "SOCIAL ANALYTICS"

The screenshot displays four panels of a Microsoft Social Analytics interface:

- Data Acquisition: Bill Gates**: Shows tweets from AverageMDBoi, Marcelo Cueva, XCoolQuotes, CNNMoney, and ZDNet.
- Data Acquisition: Windows 8**: Shows tweets from AwkwardCoder, VG, EverythingMS, and ZDNet.
- Windows 8 NOT T**: Shows tweets from AwkwardCoder, VG, VG, and Jorge Montez.
- by BillG Melinda or Foundation**: Shows tweets from Bill Gates, Bill Gates, Bill Gates, and RodrigoFPrado.

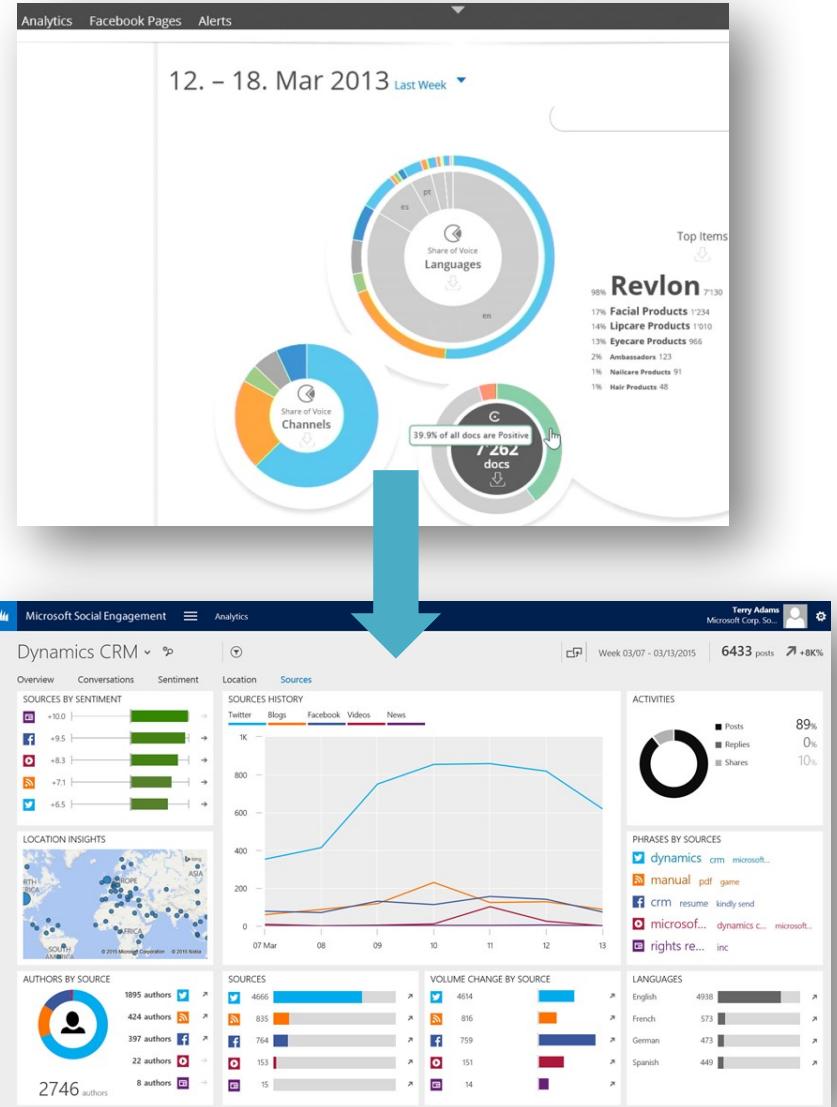
Each panel includes a header with a title, a search bar, and a log out button. The interface uses a dark theme with blue and white text.

<http://www.zdnet.com/article/microsoft-delivers-service-for-integrating-social-web-data-into-business-apps>



# MSFT & Social: making it real

- MSFT acquired Swiss company & product “Netbreeze” in March 2013
- Initially branded as “Microsoft Social Listening”
- Rebranded & expanded into “Microsoft Social Engagement” in 2015



# MSE Core Functionality





# Licensing

- **MSE Professional**
  - Included in CRM Online Professional (for 10+ users), or purchased separately
  - Access (almost) all MSE features
  - Search 10k posts/month
- **MSE Enterprise**
  - Included in CRM Online Enterprise, or purchased separately
  - *Required for linking MSE posts to CRM*

Social Engagement Professional

Social listening, share of voice, and trend alerts

\$75

per user/month

[Buy](#)

Microsoft Social Engagement Professional includes:

- Social listening
- Social center (2 streams/user)
- Social accounts
- Trend alerts

Microsoft Social Engagement CRM pricing includes 10,000 posts per organization/month.

**Additional posts:**

- \$100 for 10,000 posts/month
- \$700 for 100,000 posts/month
- \$4,000 for 1,000,000 posts/month

Social Engagement Enterprise

Unlimited streams, sharing streams, assigning posts, and integration with Microsoft Dynamics CRM

\$125

per user/month

[Buy](#)

Microsoft Social Engagement Enterprise includes:

- Social listening, social accounts, trend alerts

**Plus:** Social center includes unlimited streams, sharing streams and assigning posts to users

Microsoft Social Engagement CRM pricing includes 10,000 posts per organization/month.

**Additional posts:**

- \$100 for 10,000 posts/month
- \$700 for 100,000 posts/month
- \$4,000 for 1,000,000 posts/month



# Search Topics

Microsoft Social Engagement    Search Setup

Summary    Blocked Content

## Surface (FI)

**SEARCH TOPIC SETTINGS**

Name: Surface (FI)  
Category: Hardware  
Owner: CRM System    Created: 10/13/2015

**RULES**

Source	Action
surface	

**ADD RULE**

Choose the type of search rule to configure.

**Keywords rule**  
The keyword search rule allows you to set up a search query with keywords, inclusions, and exclusions, as well as choosing in which languages and on which sources to search. For example, if you use Microsoft, MSFT as keywords, and CRM as inclusions, you'll get posts that contain Microsoft OR MSFT AND CRM.

**Facebook pages rule**  
The Facebook page rule allows you to capture all conversations on a public Facebook page. The conversations are captured regardless of any previously defined keyword search rule in the same search topic.

**Twitter rule**  
The Twitter rule allows you to track the conversations for a specific Twitter profile. The Twitter profiles are captured regardless of any previously set keyword search rule in the same topic.

**Private messages rule**  
You can acquire private messages from authenticated Twitter and Facebook Accounts when (i) a Facebook or Twitter Profile is authenticated on the Social Profiles page; and (ii) the acquisition of private messages has been enabled by the owner of the profile.

Topics consist of rules for either keyword search or specific FB page / Twitter profile

**ACTIVE RULE**

Blogs  
 Twitter  
 Videos  
 News

News coverage is limited to the following languages: English, French, German, Spanish, and Portuguese.

You have the right to reproduce, display and distribute copyrighted News for your internal business purposes only, and shall not modify or publicly display copyrighted News.

Languages 1/4

SELECT ALL

English  
 Finnish  
 German  
 Swedish

Keywords: surface

Keyword rules are targeted to sources & languages, with sets of keyword inclusion/exclusion rules



# Social Profiles

Microsoft Social Engagement    ≡   Settings

Personal Settings    Global Settings    User Management    Connections    Allowed Domains

**OWNED PROFILES**

Profile	Type	Acquisition	Sharing	Owners
@jukkan	Profile	0	1	
@msdynrmfi	Profile	1	1	
Jukka Niiranen	User	0	1	

**SHARED PROFILES**

Profile	Type	Acquisition	Sharing	Owners
PROFILES WITHOUT OWNERS				

**Twitter Profile**

 @msdynrmfi

Acquisition of private messages

▶  Active

Sharing

Select users Add 

User name 

SELECT ALL

- Alicia Thomber
- Allie Bellew
- Amy Alberts
- Anne Weiler
- Carlos Grilo
- Christa Geller
- CRM System

**Authorize MSE to post from your Twitter & FB profiles**

**Authorize other MSE users to posts as shared profiles**



# Analytics: overview

Microsoft Social Engagement    Analytics

Products       Jukka Niiranen    Contoso Social      

Overview    Conversations    Sentiment    Location    Sources

**SENTIMENT**

8.3 index    8.3 change

-10    0    +10

**VOLUME**

Volume    Average

400    300    200    100    0

11 Oct    14    17    20    23    26    29    04    07    10

**TOPICS BY SENTIMENT**

#MSDY... +8.3    Dynamic... +9.2    Dynamic... +5.4

**LOCATION INSIGHTS**

EUROPE    ASIA    AFRICA    SOUTH AMERICA    NORTH AMERICA

**SOURCES**

5,737    84

**AUTHORS**

Author	Followers
inogic (Inogic)	429
DynCRMJobs (MS Dynamics C...)	205
CristinaFritz (Cristina Fritz Gom...)	137
MSDynamicsCRM (MicrosoftDy...)	122
intelligentcrm (IntelligentCRM )	114

**PHRASES**

microsoft dynamics great get better data tip #crm microsoft CRM dynamics use online using #msdynncrm new via team customer microsoft dynami...

**SEARCH TOPICS**

Dynamic... 173    Dynamic... 84

**LANGUAGES**

Language	Posts
English	5,814
German	4
Finnish	4

Analyze post data via 5 preconfigured dashboards

Month 10/11/2015 - 11/10/2015    5.8k posts

Download data to Excel

Drill into charts for details

The screenshot displays the Microsoft Social Engagement Analytics interface. At the top, there's a navigation bar with 'Microsoft Social Engagement' and 'Analytics'. On the right, a user profile for 'Jukka Niiranen' from 'Contoso Social' is shown with a gear icon. Below the navigation, there are tabs for 'Products', 'Overview', 'Conversations', 'Sentiment' (which is selected), 'Location', and 'Sources'. A large central area contains several charts and tables. On the left, a 'SENTIMENT' section shows a circular gauge with an 8.3 index and a green bar chart for change. Below it, 'TOPICS BY SENTIMENT' lists three topics with their respective scores. The main area features a 'VOLUME' line chart showing fluctuations over time from October 11 to October 10. To the right, there are sections for 'PHRASES' (a list of hashtags and terms), 'SEARCH TOPICS' (a donut chart), and 'LANGUAGES' (a table showing post counts by language). A blue callout bubble points to the 'SENTIMENT' section with the text 'Analyze post data via 5 preconfigured dashboards'. Another callout bubble points to the 'SEARCH TOPICS' section with 'Download data to Excel'. A third callout bubble points to the bottom right corner with 'Drill into charts for details'.



# Analytics: posts & filters

Microsoft Social Engagement    Analytics

Jukka Niiranen  
Contoso Social   

Products   

Overview    Conversations    Sentiment

Posts

akaes @akaesny  
Businesses with a social media strategy in new, innovative ways <https://t.co/K7>

Dynamica Labs @Dyn...  
"most desired #CRM features were social capabilities" <https://t.co/itqKIndsV5> #

Tracy Kinsey @TracyKi...  
"How Microsoft Motivates, Educates, and Inspires Businesses to Win With Social Selling" <https://t.co/scrn> #cloud

1 filter    CLEAR    APPLY    CANCEL

EXPAND ALL

Keywords 1

*add keywords*

social

Sources

Languages

SELECT ALL

English    Finnish    German    Swedish

(i) Sentiment is available English, Finnish, German, Swedish

Sentiment

Sentiment status

Reach

(i) Reach is available for Twitter and News

SELECT ALL

5 (Highest reach)    4 (High reach)

Month 10/11/2015 - 11/10/2015    58 posts

Positive    21:26, 11/05/2015  
to Win With Social Selling"

No more posts to show

Drill into stream of matching posts

Filter analysis data set by keyword, source, language, sentiment, reach, location...



# Social Center

Microsoft Social Engagement    Social Center    Jukka Niiranen Contoso Social   

#MSDYNCRM

MicrosoftDyn... @m\_hanceSoftware We're excited for our new Surface Hub, but we're especially looking forward to learning and real-time dashboards! #MSDYNCRM

Ledgeview Pa... 9 Tips to Improve CRM User Adoption After Go-Live <https://t.co/n29zfNWkSj> #UserAdoption #CRM #salesforce #MSDynCRM

Jukka Niiranen... 57 min This looks like a very feature rich editable grid for #MSDYNCRM: <https://t.co/qgFvgQxnGQ> - Download from #CodePlex <https://t.co/TAdgJYgQJu>

Jukka Niiranen... 1 hr This looks like a very feature rich editable grid for #MSDYNCRM: <https://t.co/qgFvgQxnGQ> - Download from #CodePlex <https://t.co/TAdgJYgQJu>

Jukka Niiranen... 1 hr This looks like a very feature rich editable grid for #MSDYNCRM: <https://t.co/qgFvgOxnGQ> - Download from #CodePlex <https://t.co/TAdgJYgQJu>

Surface

2 hr QoZH Ecroaker: <https://t.co> Microsoft Korea to be tested on Surface Hub #INSubcontinent #Korea

5 hr Jukka Niiranen... Surface Hub on jäättävä kokonaisuus. Tuottavuustyökalu isolla Tällä. Näitä saat @AteaFinland tammikuusta lähtien! <https://t.co/Artp1cJr53>

6 hr Ville @willie\_d... @semi\_rella surface 3 on varsin pätävä windows tabletti/hybridti Akku kestää, kevyt ja mobiili. Tosin näppiksen kera sillekin kertv. hintaa.

gankogankog... Kyllä, meillä on järvenpinta. Mihin torstaina kello

Pasi Vahimaa ... Kappas, Apple on onnistunut kopioimaan Surface Pron, joka jo pitkään ollut minun ainoana koneena. <https://t.co/lmHhalPOFK>

http://www.yo... 1 day

Configure personal set of post streams to follow

Filter stream content, share streams with other users

**@MSDYNCRMFI**

Stream Settings

Name: @MSDYNCRMFI    Owner: Jukka Niiranen

Color: yellow    Sorting: Date Published

Sharing:

No users selected   

Shared with all users

Streamed data

0 filters

EXPAND ALL

Keywords

Sources

Languages

SELECT ALL

English



# Activity Map

#MSDYNCRM

Area filter

-24h Now

64% 34% 3%

✉

-24h Now 20 P

80 posts

Show live  
buzz/sentiment map  
of posts from last  
30min - 24h

INSIGHTS <

PHRASES

- #crm #msdynCRM four acquisitions scripting
- also dynamics CRM CRM make online
- client #CRM #msdynCRM blog using
- get release via awesome microsoft yes
- will data microsoft dynamics CRM

> POSTS

Inogic @inogic 7 min  
Want to get hands on experience in Dynamics CRM? Just Sign up & Start Exploring <https://t.co/deMhzreuwk> #MSDYNCRM

Kerry Rosvol... 7 min  
Yes, #msdynnav can connect to #msdynCRM AND it can automatically update exchange rates  
#directions #navug #crowdgoeswild

slowCRM (Slow...) 40 min  
Insert data into N:N relationship with drag and drop listbox <http://t.co/xenBRuwlMj>  
#MSDYNCRM by @ankit007 shah <http://t.co/La30ICmlr>

Retweeted by CRM Consultants @crmcon...

JoelLindstrom... 40 min  
Read and vote for the #MSDynCRM mobile connect items in @scottsewell manifesto  
<https://t.co/Jp7smcRlh>

Retweeted by CRM Consultants @crmcon...

Microsoft Social Engagement

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# Alerts

Microsoft Social Engagement    Message Center

**ALERTS**

#MSDYNCRM trending Trend Alert

**@MSDYNCRMFI** Post Alert

**Set up trend or post alerts for specific searches or accounts**

**ALERT DETAILS**

Name: @MSDYNCRMFI Status: Active

Alert Type: Post Alert

No duplicates

Recipients:

Please be aware that you might be sharing confidential information outside of Microsoft Social Engagement.

Email recipients: 1 **@gmail.com**

Data Sources:

@MSDYNCRMFI

No filters

Microsoft Social Engagement

## Post Alert

This alert was triggered in the following Microsoft Social Engagement solution: [Contoso Social](#)

### Alert **@MSDYNCRMFI** – 1 posts

Recent posts matching your filters:

**Twitter** Finnish Teppo Testaaja @TesTeppo <http://twitter.com/TesTeppo/statuses/656828015259832320>

**Unknown sentiment** [@msdyn.crmfi](#) Onko mitään virallisempaa tietoa tästä aiheesta?

[@msdyn.crmfi](#) Onko mitään virallisempaa tietoa tästä aiheesta?

If you don't want to receive this alert, contact the owner of this alert: [Jukka Niiranen](#).

**Deliver email notifications to specific addresses when alert criteria is met**



# MSE feature development

- MSE is currently adding new features with a monthly release cadence
  - 2015 Update 1.2 (<http://bit.ly/mse15u12>): link social posts to CRM
  - 2016 Update 1 (<http://bit.ly/mse16u1>): create new posts, not just replies
- More social channels coming in future releases, incl. custom sources via RSS
  - Currently only Facebook & Twitter supported
- More sentiment languages continuously added
  - Currently 20 for search language, 15 for sentiment analysis
- Keep an eye on the "What's New" page for Social Engagement at <http://bit.ly/msenew>
- Read about MSE 2016 roadmap from "Get Ready" page for Dynamics CRM at <http://bit.ly/crmnext>



# MSE 2016 roadmap items

A screenshot of the Microsoft Social Engagement interface. It shows a 'NEW TWEET' screen with a message: 'Are you ready for a new world of technology? News and updates from Nokia.' Below the message are two small images labeled 'Photos (2)'. At the bottom are buttons for 'Send and close' and 'Send'.

Create new posts,  
not just replies

A screenshot of the Microsoft Social Engagement interface showing an author profile for 'NOKIA'. The profile includes a header picture, follower count (30,496), following count (4,545), tweets (411), and images (17). Below the profile is a section titled 'ACTIVITY IN THE PAST 30 DAYS' with a line graph showing volume over time.

View  
author  
profiles

A screenshot of the Microsoft Social Engagement app for sales users. The interface includes a header with 'Tara Smith' and 'Contoso'. It features several sections: 'Customer and Competitive Insights' (listing a customer post and competitor post), 'Social Metrics' (a gauge chart for 'Growing your network' at 72%), 'New Leads' (listing three leads: Michael, Alicante Trabaja, and Kelli), 'Engaging your network' (a gauge chart at 45%), 'Trending Phrases' (a list of trending hashtags like 'products', 'b2b', 'dynamics', etc.), and 'Increase your network' (a list of users to follow). There are also bar charts for 'Messages posted', 'Posts shared by followers', and 'Impressions'.

Social Selling app  
for sales users

A screenshot of a task list or backlog interface. It shows a list of items with checkboxes, labels, and assignees. One item is tagged with 'Competitor', 'Compare', and 'Lead'. Another item is tagged with 'Traged'. The interface includes buttons for 'SELECT ALL', 'CHANGE LABEL', 'ASSIGN', 'EDIT SENTIMENT', and 'REMOVE'.

Automatic  
tagging of  
posts

# MSE and CRM Integration





# Connecting MSE to CRM

- Integration used for pushing social posts & profiles to CRM
- Currently only CRM Online 2015 Update 1 supported, on-prem support coming with 2016
  - Must be in same tenant as MSE if Online
- One MSE can talk to multiple CRM instances
  - One instance can be set as default to linked posts

The screenshot shows the Microsoft Social Engagement interface. At the top, there's a navigation bar with 'Microsoft Social Engagement' and 'Settings'. On the right, a user profile for 'Jukka Niiranen' from 'Contoso Social' is shown. Below the navigation, there are tabs for 'Personal Settings', 'Global Settings', 'User Management', 'Connections' (which is highlighted in blue), and 'Allowed Domains'. The 'Connections' tab displays a section titled 'MICROSOFT DYNAMICS CRM CONNECTIONS' with a sub-instruction: 'Establish a connection between Microsoft Social Engagement and Microsoft Dynamics CRM. This allows users to create and access Dynamics CRM records from within Social Engagement.' A table lists one connection: 'Contoso' with 'di201510us.crm.d...'. To the right of the table is a modal window titled 'ADD CONNECTION' with fields for 'Connection type' (set to 'CRM Online'), 'CRM Instance' (set to 'https://'), and 'Name'.



# Connecting CRM to MSE

- Integration used for showing embedded widgets from MSE in CRM forms and dashboards
- Supports both CRM Online and on-premises, starting from CRM 2015
- Only user interface level "integration", CRM doesn't send any data back to MSE



## Microsoft Social Engagement configuration

Connect Microsoft Dynamics CRM to your Microsoft Social Engagement solution. With Microsoft Social Engagement, you can get in-context social insights.

Select the Microsoft Social Engagement solution to connect to:

Contoso Social (9975)

This will delete all existing data in CRM regarding search topics, search topic categories, and visuals for any Social Insights configured on forms and dashboards.



# Social Profiles in CRM

- Created by MSE the first time you link a social post into CRM
- Cannot be created in CRM manually
- Are not matched to existing CRM contacts, duplicate contacts need to be manually merged
- Customer is always contact, not account

Microsoft Dynamics CRM | Service | Social Profiles | TesTeppo | ...

CONNECT | DEACTIVATE | DELETE | ASSIGN | EMAIL A LINK | SHARE | ...

SOCIAL PROFILE  
TesTeppo

Social Channel: Twitter | Influence Score: 10,00 | Owner: Jukka

SOCIAL PROFILE

Profile Name *	TesTeppo
Profile Link	<a href="http://www.twitter.com/TesTeppo">http://www.twitter.com/TesTeppo</a>
Blocked	No
Customer *	Teppo Testaaja

CASES

Case Title ↑	Status	Case Number	Created On
@msdynrmfi Onko mitään virallisempaa tietoa tästä ...	Active	CAS-00037-R5T5Q2	21.10.2015 16:51
Eikö Surface Book tule lainkaan saataville suomalaisell...	Active	CAS-00036-X6Q5S3	20.10.2015 22:53

RELATED SOCIAL PROFILES

Profile Name ↑	Customer	Social Channel	Influence Score	Blocked
TesTeppo	Teppo Testaaja	Twitter	10,00	No



# Social Activities in CRM

- Created by MSE every time you use Link-to-CRM feature
- Cannot be created in CRM manually
- Contain both the post attributes (post text, date, channel, social profile) as well as JSON payload with more channel specific properties

Microsoft Dynamics CRM | ≡ Social | Social Activities |

DELETE CONVERT TO ADD TO QUEUE ASSIGN QUEUE ITEM DETAILS

**SOCIAL ACTIVITY**

I've just seen the #Salesforce Lightn.

Priority	Sentiment Value	Activity Status	Social Channel
Normal	0,00	Completed	Twitter

**Title** I've just seen the #Salesforce Lightn.  
**Posted By** leontribe  
**Posted On** 4.11.2015 19:28  
**Posted To**--  
**Received As** Public Message  
**Post URL** <http://twitter.com/leontribe/status/628011111111111111>

**Post Description**

I've just seen the #Salesforce Lightning Experience. Talk about imitation being the sincerest form of flattery. Take pride #msdynocrm team

**Regarding** Leon Tribe  
**Created On** 5.11.2015 1:01  
**Modified On** 5.11.2015 1:01  
**Owner\*** Jukka Niiranen

**More Info**

Additional Parameters

```
{"targetEntityName": "socialactivity", "userPreferredTargetEntity": "lead", "socialHandle": "leontribe", "profileName": "leontribe", "profilelink": "http://www.twitter.com/leontribe", "fullName": "leontribe", "community": 2, "influencescore": 48.0, "notes": "Salesforce customers about to get exposed to best of Dynamics CRM features? Worth a call!", "isRetweet": false, "MSEbacklinkPost": "https://listening-prod.dynamics.com/app/9975/#postid=9733"}
```



# Social Activities in CRM (2)

CONTACT ▾  
Teppo Testaaja ▾

## Summary

### CONTACT INFORMATION

Full Name *	Teppo Testaaja
Job Title	--
Account Name	--
Email	--
Business Phone	--
Mobile Phone	--

### POSTS ACTIVITIES NOTES

All | Add Phone Call Add Task ...

- @msdynrmfi Onko mitäään virallisempaa tietoa tästä aih...  
Posted by TesTeppo 21.10.2015 16:51  
Sentiment Value 0 Posted As Public Message
- Eikö Surface Book tule lainkaan saataville suomalaisella n...  
Eikö Surface Book tule lainkaan saataville suomalaisella näppäimistöllä? Voihan "ÄäÖöÅå" ...  
Post URL <http://twitter.com/TesTeppo/statuses/656540987557302272>  
Posted by TesTeppo 20.10.2015 22:53  
Sentiment Value 0 Posted As Public Message

Shown in standard activity views related to the contact, including rollup to parent account's activity history

Microsoft Dynamics CRM | Sales | Activities |

TASK EMAIL APPOINTMENT | PHONE CALL LETTER FAX SERVICE ACTIVITY ...

Received Social Activities

All Activities Task Fax Phone Call Email Letter Appointment Service Activity Campaign Response Campaign Activity Recurring Appointment Social Activity

System Views All Social Activities Failed Social Activities My Facebook Social Activities My Twitter Social Activities Processing Social Activities Received Social Activities Create Personal View Save Filters as New View Save Filters to Current View

Social Channel	Posted By	Sentiment Value...	Regarding
Twitter	slowxrm	0,00	Slow xrm via Twitter on 11.11...
Twitter	jon_rivers	0,00	Jon Rivers via Twitter on 10.11...
Twitter	nzCRMguy	0,00	Mark Smith via Twitter on 9.11...
Twitter	AndrewBibby	1,00	Andrew Bibby
Twitter	leontribe	0,00	Leon Tribe
Twitter	sirjameswood	0,00	James Wood
Twitter	nzCRMguy	0,00	Mark Smith via Twitter on 4.11...
Twitter	carsten_msc...	1,00	Carsten Groth via Twitter on 4...

Can be directly accessed from standard activity menus, to query social activities across different customers



# Linking MSE posts to CRM

Microsoft Social Engagement    Analytics

#MSDYNCRM    1    Today 11/15/2015    11 posts    -92%

Overview    Conversations    Sentiment    Location    Sources

POSTS

SELECT ALL     CHANGE LABEL     ASSIGN     EDIT SENTIMENT     REMOVE

Profile	Location	Date	Post
	India	1:00, 11/15/2015	Inogic @inogic Introduction of Rollup Fields in CRM 2015 <a href="https://t.co/DE02EW6pfR">https://t.co/DE02EW6pfR</a> #MSDYNCRM
	United Kingdom	0:51, 11/15/2015	Ramón Tébar Bueno @ramontabar London, United Kingdom  Metro Bank and Microsoft Dynamics. #msdynCRM, #microsoft, @metro_bank, @MSFTDynamics, @MSDynamicsCRM <a href="https://t.co/sutqOyGRir">https://t.co/sutqOyGRir</a>
	United Kingdom	0:51, 11/15/2015	Ramón Tébar ... Metro Bank and Microsoft Dynamics. #msdynCRM, #microsoft, @metro_bank, @MSFTDynamics, @MSDynamicsCRM <a href="https://t.co/sutqOyGRir">https://t.co/sutqOyGRir</a>
	India	0:50, 11/15/2015	Inogic @inogic #MSDYNCRM – Quick Fix for #VALUE! Errors in Exports to Excel by @CRMSoftwareBlog <a href="https://t.co/xgymJEsibX">https://t.co/xgymJEsibX</a> <a href="https://t.co/FgEO3DNbc2">https://t.co/FgEO3DNbc2</a>
	United States	0:42, 11/15/2015	Catapult Syste... Miss this week's webinar on @MSDynamicsCRM? Not to worry, we have 2 webinars remaining in the series! <a href="https://t.co/X8o8AQwTYD">https://t.co/X8o8AQwTYD</a> #MSDYNCRM

Jukka Niiranen    Contoso Social   

REPLY    RETWEET    FAVORITE     LINK TO CRM

ASSIGN TO     SET LABEL

Create record in Microsoft Dynamics CRM

Automatically create records from the current post.

Instance: Contoso

Entity: Lead

Notes: Metro Bank heavily investing in Microsoft technologies. We should get in contact with them to check their plans for Power BI & Stream Analytics.

Create

Open the post, click "Link to CRM"(select CRM instance if more than one)

Choose target entity, e.g. lead, case

Enter free text notes (optional)

Click "Create" to send info to CRM



# Example of new CRM lead created from MSE post

New contact +  
social profile  
created from the  
post

New lead created  
with post topic  
and user notes  
from MSE

Social post linked  
to activity history  
of lead, contact (+  
account, if exists)

Microsoft Dynamics CRM | Sales | Leads | Ramón Tébar Bueno | Jukka Niiranen Contoso

+ NEW - DELETE QUALIFY DISQUALIFY ADD TO MARKETING LIST ASSIGN SHARE ...

**LEAD** Ramón Tébar Bueno

Lead Source: Web, Rating: Warm, Status: New, Owner: Jukka

Qualify (Active) → Develop → Propose → Close

✓ Existing Contact? Ramón Tébar Bueno  
Existing Account? click to enter  
Purchase Timeframe click to enter

Estimated Budget click to enter  
Purchase Process click to enter  
Identify Decision Maker mark complete

Capture Summary Metro Bank heavily invest

**Summary**

**LEAD**

Topic\*: Metro Bank and Microsoft Dynamics. #msdyncrm, #microsoft, @m...  
Description Metro Bank heavily investing in Microsoft technologies. We should get in contact with them to check their plans for Power BI & Stream Analytics.

**CONTACT**

Name\*: Ramón Tébar Bueno  
Business Phone --  
Mobile Phone --  
Email --

**COMPANY**

Company\* --

**POSTS ACTIVITIES NOTES**

All | Add Phone Call Add Task ...

**Metro Bank and Microsoft Dynamics. ...**  
Metro Bank and Microsoft Dynamics. #msdyncrm, #microsoft, @m...  
Post URL <http://twitter.com/ramontebar/statuses/665663368498425856>  
Posted by ramontebar Today  
Sentiment Value 0 Posted As Public Message

**STAKEHOLDERS**

Name	Role
Ramón Tébar Bueno	Stakeholder

**COMPETITORS**

Name
No competitors found.



# Choosing CRM entities available in MSE

Microsoft Social Engagement    ≡ Settings

Personal Settings    Global Settings    User Management    **Connections**    Allowed Domains

**CRM INSTANCE**

CRM instance: `crm.dynamics.com`    Organization language:    Connected on:

Name: `Contoso`

Set as default    ⓘ

Enable instance    ⓘ

**RECORD DETAILS**

Display Name	Record Form	Description
Case	<input checked="" type="checkbox"/>	Service request case associated with a contract.
Lead	<input checked="" type="checkbox"/>	Prospect or potential sales opportunity. Leads are co...
Signal	<input checked="" type="checkbox"/>	

**SELECT ENTITIES**

- Office Groups Meetings Cache Info    `msdyn_officegroup:`
- Office Groups Members Cache Info    `msdyn_officegroup:`
- Office Groups Photo Cache    `msdyn_groupspivot`
- Opportunity    Potential revenue-generating even...    `opportunity`
- Order    Quote that has been accepted.    `salesorder`
- Profile Album    Contains user profile images that a...    `msdyn_postalbum`
- Quick Campaign    System operation used to perform ...    `bulkoperation`
- Quote    Formal offer for products and/or s...    `quote`
- Service    Activity that represents work done ...    `service`
- Signal       `new_signal`
- Social Profile
- System Job
- Team
- User

You can enable/disable CRM instance specific entities to be available in the "Link to CRM" dialog for MSE posts

MSE social posts can be converted to many default and all custom CRM entities



# Configuring fields available across MSE and CRM

Microsoft Social Engagement    ≡ Settings

Personal Settings    Global Settings    User Management    **Connections**    Allowed Domains

**CRM INSTANCE**

CRM instance: crm.dynamics.com

Name: Contoso

Set as default    ⓘ

Enable instance    ⓘ

**RECORD DETAILS**

SELECT ENTITIES

Display Name	Record Form	Description
Case	<input checked="" type="checkbox"/>	
Lead	<input checked="" type="checkbox"/>	
Signal	<input checked="" type="checkbox"/>	

You don't configure the field mapping from MSE to CRM here, instead you'll leverage CRM Record Creation Rules

**ENTITY DETAILS**

Display Name: Lead    Unique Name: lead

Description: Prospect or potential sales opportunity. Leads are converted into accounts, contacts, or opportunities when they are qualified. Otherwise, they are deleted or archived.

Define record details form for Dynamics CRM entities  
To define the information to be shown in the record details form, select the CRM attributes that are available for this entity.

Topic	▼	X
Name	↑ ▼	X
Company Name	↑ ▼	X
Rating	↑ ▼	X
Status	↑ ▼	X
Created On	↑ ▼	X
Lead Source	↑ ▼	X
Owner	↑	X

+ ADD MORE

What you can specify in MSE is what fields from the CRM entity should be shown in the preview when viewing the linked record via MSE UI



# Using CRM Record Creation Rules

- MSE will only ever create Social Profiles & Social Posts to CRM
- All the business logic for creating other records is managed in CRM via Record Creation and Update Rules
  - First introduced as "Case Creation Rules" in CRM 2013 SP1
  - Expanded into general purpose rules in CRM Online 2015 Update 1

Microsoft Dynamics CRM | ≡ Settings | Service Management

Service Management

Set up customer service for your organization.

**Case Settings with Record Creation and Update Rules**

**Queues**  
Create and manage service queues, and manage the membership of private queues. Establish criteria for automatic record creation and updates.

**Parent and Child case settings**  
Specify the information to be inherited from a parent case to child cases. Define case closure cascade settings between parent and child cases.

**Routing Rule Sets**  
Create or delete case routing rules. Change existing rule information, such as conditions, order, and actions.

**Automatic Record Creation and Update Rules**  
Create and manage rules for automatic record creation and updates. You can set up rules for either out-of-the-box entities or custom entities.

Microsoft Dynamics CRM | ≡ Settings | Service Management

+ NEW DELETE | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL

➡ All Record Creation and Update R... ▼ Search for records

✓	Name <span style="font-size: small;">↑</span>	Status	Source Type	Queue	Channel Property Group	Cr	
	Another test rule	Draft	Social Activity				
	Email to case rule	Draft	Email				
	Tweets to Records	Active	Social Activity		MSE Posts		



# Configure your Record Creation Rules

- Choose source activity type
  - Emails & Social Activities have specific built-in conditions available
- Configure Channel Properties
  - Process additional parameters of the source activity record
- Add & order Record Creation Details (= Rule Items)
  - Execute the business logic for target records to create & other processes (workflows)

Microsoft Dynamics CRM | ≡ Settings | Service Management

+ NEW ✓ ACTIVATE ⚡ DELETE 🙉 ASSIGN 📧 EMAIL A LINK ⋮ ↑ ↓ 🔍

RECORD CREATION AND UPDATE RULE  
**Tweets to Records** ≡

! This rule is inactive. Records won't be created for activities added to the specified queue.

Name *	Tweets to Records
Source Type *	Social Activity
Queue	--
Owner *	Jukka Niiranen

**CHANNEL PROPERTIES**

Additional Properties MSE Posts 🔍

**SPECIFY CONDITIONS FOR RECORD CREATION**

Create records for blocked social profiles  
 Create records for private messages only

**SPECIFY RECORD CREATION AND UPDATE DETAILS**

↓ ↑ +

Name	
Tweet to Lead	
Tweet to Case	
Tweet to Signal	



# Configuring Channel Properties

- Channel Properties will be available for the business logic in your record creation rules
- You must "parse" them from the Social Activity Additional Parameters field (JSON payload)
- Examples:
  - *userPreferredTargetEntity* = entity chosen by MSE user in "Link to CRM" dialog
  - *notes* = text entered by MSE user

CHANNEL PROPERTY GROUP  
**MSE Posts**

Name *	MSE Posts	Created On
Source Type *	Social Activity	

**Channel Properties**

Name ↑	Data Type	Application Source	Description
<a href="#">userPreferredTargetEntity</a>	Single Line Of Text	MSE	Record type to create
<a href="#">notes</a>	Single Line Of Text	MSE	Notes added by the MSE user when linking post to CRM

**Additional Parameters**

```
{"targetEntityName":"socialactivity","userPreferredTargetEntity":"lead","socialHandle":"ramontebar","profileName":"ramontebar","profilelink":"http://www.twitter.com/ramontebar","fullName":"Ramón Tébar Bueno","community":2,"influencescore":46.0,"notes":"Metro Bank heavily investing in Microsoft technologies. We should get in contact with them to check their plans for Power BI & Stream Analytics.", "isRetweet":false,"MSEbacklinkPost":"https://listening-prod.dynamics.com/app/9975/#postid=25313"}
```

CHANNEL PROPERTY  
**New Channel ...**

Name *	influencescore
Data Type *	Floating Point Number
Application Source	MSE
Description	Klout score of post author



# Configuring Record Creation Rule Items

- Rule Items evaluate a condition against the source activity
  - E.g. "did the user choose this social post to be created as a Case entity record?"
- If Rule Item condition is met, the actions are performed
  - E.g. create a case, send email notification, start child workflow process to evaluate more complex business logic

The screenshot shows the configuration interface for a 'Record Creation and Update Rule Item'. The title bar says 'Record Creation and Update Rule Item' and the sub-tab is 'Tweet to Case'.  
**General Tab:**  
Name:   
**Condition Tab:**  
The condition section uses a query builder with the following criteria:

- Group AND
- Channel Properties: userPreferredTargetEntity Equals incident

**ACTIONS Tab:**

Create record and set as the regarding of the source activity for update and associate requests

**ACTIONS:**

- Add Step | Delete this step.
- Create: Case | Set Properties

**SPECIFY OTHER ACTIONS:**

- Add Step | Delete this step.
- Start child workflow: Create (Case) | Evaluate case priorit

Setting Regarding of a record? [What you need to know](#)



# Current limitations with MSE-CRM integration

- “Link to CRM” in MSE will always create a new record, can’t link to existing records in CRM
  - E.g. Case created into CRM will only show the first social post, not replies & discussion threads
  - No option to link just a new Social Activity to an existing Social Profile without creating a new Regarding record in the process
- Social Profiles are matched only against existing profiles, not existing contacts
  - Profiles are not linked to existing customer records until you merge the new duplicate contacts created by MSE in CRM



# MSE and CRM Customization





# Social Post & Profile entities customizability

- Can add new fields and views
- Can customize forms
  - Can't create additional forms
- Can have charts and appear on dashboards
- Can be accessed via workflows
- Can be used in Phone & Tablet client

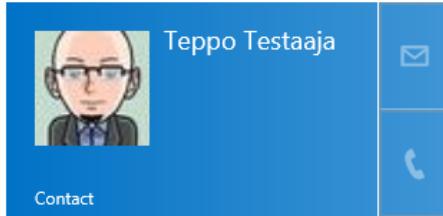


# Social Profile viewed on CRM Tablet client



← TesTeppo

Relationships



27/27

Social Profile

<b>🔒 Social Channel</b>	Twitter
<b>🔒 Influence Score</b>	10,00
<b>Owner *</b>	<a href="#">Jukka Niiranen</a>
<b>Profile Name *</b>	TesTeppo
<b>Profile Link</b>	<a href="http://www.twitter.com/TesTeppo">http://www.twitter.com/ TesTeppo</a>
<b>Blocked</b>	No
<b>Customer *</b>	<a href="#">Teppo Testaaja</a>

Cases

@msdyncrmfi Onko mitään  
virallisempaa tietoa tästä  
Active  
CAS-00037-R5T5Q2  
21.10.2015 16:51

Eikö Surface Book tule lainkaan  
saataville suomalaisella  
Active  
CAS-00036-X6Q5S3  
20.10.2015 22:53



# Social data viewed via dashboard on Tablet client

dashboards

SEARCH

## Social Data

Received Social Activities

TOP 10 POSTS BY AUTHOR

Post Author	Count
Mitch Milam	1
Guido Pr...	1
Guido Pr...	1
Microsof...	2
Teppo Te...	2
Gus Gonz...	2
David Pe...	2
Craig Ha...	2
Jon Rivers	3
Mark Smith	6

Active Social Profiles

TOP 10 INFLUENCE SCORES

Customer	Influence Score
Gus Gonz...	47,00
Andrew B...	48,00
Leon Tribe	48,00
Inogic	48,00
Carsten ...	52,00
David Pe...	52,00
Brian Ga...	53,00
Jon Rivers	59,00
Jukka Ni...	60,00
Mark Smith	65,00

Social Profile Contacts, Unpr...

+ Receiving

SOCIAL CHANNELS

Contact	Date	Message
James Wood	5.11.2015 0:59	---
Andre K Margono	4.11.2015 2:43	---
Adam Vero	4.11.2015 2:16	---
Carsten Groth	4.11.2015 2:13	---
Microsoft Dynamics	29.10.2015 22:41	---
Joel Lindstrom		---

CountAll (Post ID)

...



# Social dashboard options

- Using CRM-to-MSE integration
  - Embed Social Insights widgets to create a search topic specific dashboard
  - Data loaded from MSE, license required, drill through to MSE
- Using MSE-to-CRM integration
  - Build new view filters and charts for Social Profile and Social Activity entities
  - Combine with any related entity, available to all CRM users, drill down

Set up Social Insights

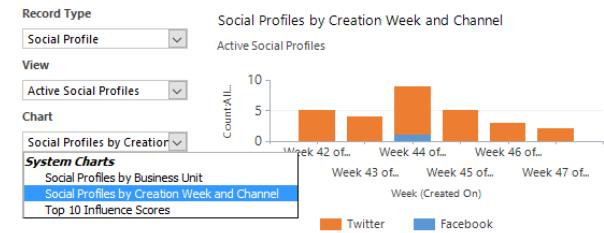
Set search topic type Set topic or category Select visuals

CATEGORY NAME: Products

Visual name	Description	Sample
1 Analytics summary	Get a quick summary of the number of posts, how your se...	
2 Buzz	Check the buzz on your search topic or category. See the total...	
3 Languages	See the top 5 languages with the most posts about your search t...	
4 Locations	See where your posts are coming from.	

Add Component

Choose the component that you want to add to the dashboard.





# Social dashboard for MSE widget data

Microsoft Dynamics CRM | Social | Dashboards | Search CRM data | Jukka Niiranen Contoso | ?

SAVE AS NEW REFRESH ALL

## Social Analytics

**PRODUCTS**

Volume history Number of posts in your time frame

Microsoft Social Engagement

**PRODUCTS**

Top 5 authors

Author	COUNTRY	POSTS	PCT
inogic (Inogic)	India	507	7.6%
DynCRMJobs (MS Dynamics CRM Jobs)		232	3.5%
CristinaFritz (Cristina Fritz Gomez)	Chile	150	2.2%
Microsoft Social Engagement			

Microsoft Social Engagement

**PRODUCTS**

Recent posts

- Inogic @inogic Theme your Dynamics CRM 2015 to Custom Solution <https://t.co/6A9YgFOlw...> 23:30 11/14/2015 EN
- Darrell Tunnell @dazinate Announcing the first release of CrmCross! A portable #MSDYNCRM SDK! Use... 23:15 11/14/2015 EN
- Marco Amoedo @marcoamoedo Check out the first infographic from the @CRMUGUK London Chapter meetin... 23:02 11/14/2015 EN
- Microsoft Social Engagement

**PRODUCTS**

Sources

Microsoft Social Engagement

**PRODUCTS**

Languages share of voice In percentage per language

Language	Share of Voice (k)
English	7.5k
German	5k
Finnish	2.5k
Swedish	0k

Microsoft Social Engagement

**PRODUCTS**

Sources summary

Source	Posts	Percentage
Blogs	0 Posts	0 %
Facebook	102 Posts	1.5 %
Twitter	6,600 Posts	98.5 %
Videos	0 Posts	0 %
News	0 Posts	0 %

Microsoft Social Engagement



# Social dashboard for CRM data

SAVE AS NEW REFRESH ALL

## Social Data ▾

### what's new

Enter post here

All records ▾ | Both Auto posts User posts

Slow xRM via Twitter on 11.11.2015 22:18

New signal from Slow xRM on Twitter: Microsoft Dynamics CRM Service Built to Handle IoT <https://t.co/lzY4JrbPDN>  
#MSDYNCRM by @EMorphy

On Slow xRM via Twitter on 11.11.2015 22:18's wall  
11.11.2015 22:18

Slow xRM

Contact Created By Jukka Niiranen.

On Slow xRM's wall

11.11.2015 22:17

Jon Rivers via Twitter on 10.11.2015 21:28

New signal from Jon Rivers on Twitter: Make plans to attend the 2016 Microsoft Dynamics Technical Conference.

<https://t.co/kNOUq85ngm> #MSDYNAX #MSDYNCRM #AX7

On Jon Rivers via Twitter on 10.11.2015 21:28's wall

10.11.2015 21:29 · ⓘ You like this

Jukka Niiranen

Now there's an event I'd surely want to attend!  
10.11.2015 21:57

## Social Profile Contacts, Unprocessed ▾

Search for records



Created On ↑ Full Name Email Company Name Business Phone Owner Address 1: City Area

15.11.2015 15:08 Ramón Tébar Bueno

Jukka Niiranen

11.11.2015 22:17 Slow xRM

Jukka Niiranen

10.11.2015 21:27 Jon Rivers

Jukka Niiranen

9.11.2015 22:19 Andrew Bibby

Jukka Niiranen

5.11.2015 05:59 James Wood

Jukka Niiranen

4.11.2015 2:43 Andre K Margono

Jukka Niiranen

4.11.2015 2:16 Adam Vero

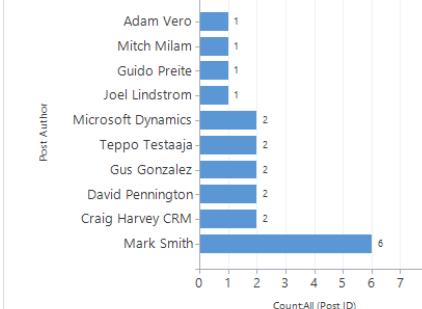
Jukka Niiranen

4.11.2015 2:13 Carsten Groth

Jukka Niiranen

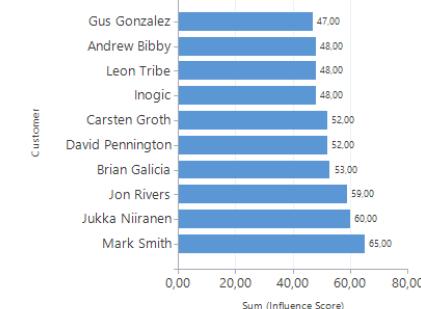
### Top 10 Posts by Author

#### Received Social Activities



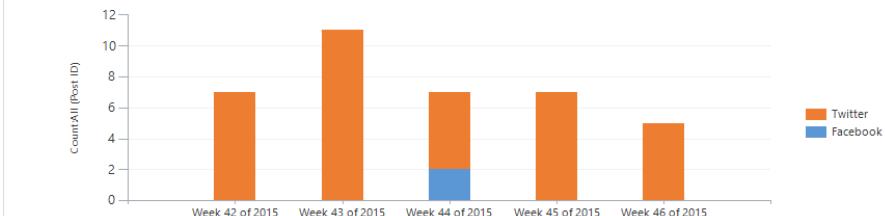
### Top 10 Influence Scores

#### Active Social Profiles



### Social Posts by Creation Week and Channel

#### Received Social Activities





# Custom entity for tracking social posts

- For non-service scenarios, every relevant customer tweet is not going to be a lead
- To use Link-to-CRM you need to always choose some entity, though
- If you want to track important social posts related to customers, partners or competitors into your CRM contacts database, you can create a custom entity, like "Signal"
- Choose this when linking tweets & FB posts into CRM contacts as records in their activity history
- Leverage CRM workflows to populate fields, process user notes, send notifications...



# Social Signals in CRM

**DIGITAL  
ILLUSTRATED**  
DESIGN TECHNOLOGY SUCCESS

Microsoft Dynamics CRM | Ⓜ Sales | Ⓜ Signals | Ⓜ

+ NEW EDIT ✓ ACTIVATE ⚒ DEACTIVATE ⚒ DELETE | ⚒ ASSIGN SHARE ...

## Active Signals ▾

Search for records

Created On	Name	Contact	Account	Social Channel	Comments
10.11.2015 21:28	Jon Rivers via Twitter on 10.11.2015...	Jon Rivers		Twitter	Upcoming conference for all Dynamics CRM & AX technical professionals.
✓ 9.11.2015 22:18	Mark Smith via Twitter on 9.11.2015...	Mark Smith	Dynamics CRM MVPs	Twitter	Make the most of your network data in CRM with this cool add-on!
4.11.2015 2:43	Andre K Margono via Twitter on 4.1...	Andre K Margono		Twitter	Fashion tips from the CRM MVP crowd :)
4.11.2015 2:33	Craig Harvey CRM via Twitter on 4.1...	Craig Harvey CRM		Twitter	CRM IFD & ADFS configuration tips
4.11.2015 2:16	Adam Vero via Twitter on 4.11.2015 ...	Adam Vero		Twitter	CRM 2016 loc
4.11.2015 2:14	Carsten Groth via Twitter on 4.11.2...	Carsten Groth		Twitter	Developer &
4.11.2015 2:13	Mark Smith via Twitter on 4.11.2015...	Mark Smith	Dynamics CRM MVPs	Twitter	Field One ne
29.10.2015 22:43	Microsoft Dynamics via Facebook o...	Microsoft Dynamics		Facebook	CRM custome
29.10.2015 22:42	Microsoft Dynamics via Facebook o...	Microsoft Dynamics		Facebook	Sales leadersl
29.10.2015 22:33	Gus Gonzalez via Twitter on 29.10.2...	Gus Gonzalez	Dynamics CRM MVPs	Twitter	MVP Summit
29.10.2015 22:30	Joel Lindstrom via Twitter on 29.10....	Joel Lindstrom		Twitter	Outlook clien

Latest signals can be viewed, filtered and searched

Microsoft Dynamics CRM | Ⓜ Sales | Ⓜ Signals | Ⓜ Mark Smith via Twitt... | Ⓜ

+ NEW ⚒ DEACTIVATE ⚒ DELETE ⚒ ASSIGN ⚒ SHARE ⚒ EMAIL A LINK ⚒ FOLLOW ...

SIGNAL  
Mark Smith via Twitter on 9.11.2015 ...

## General

Message \*  
"New version of Network Visualisations for Dynamics CRM"  
#MSdynCRM <https://t.co/HanIclfTSF>

POSTS ACTIVITIES NOTES

Enter post here

Both Auto posts User posts



Mark Smith via Twitter on 9.11.2015 22:18  
New signal from Mark Smith on Twitter: "New versio  
#MSdynCRM <https://t.co/HanIclfTSF>  
On Mark Smith via Twitter on 9.11.2015 22:18's wall  
Yesterday

Data from original social post copied to Signal field with workflow

MSE user notes also available for context & comments

URL  
<http://twitter.com/nzCRMguy/statuses/663463592554033156>  
Social Channel \*  
Twitter  
Contact \*  
Mark Smith  
Account  
Dynamics CRM MVPs  
Comments  
Make the most of your network data in CRM with this cool add-on!

Owner \*  
Jukka Niiranen



# CRM Activity Feeds for following social signals

- You can also leverage CRM Activity Feeds for automatic status updates on new Signals
- Use workflow process to create new AF post on the contact's wall
- All CRM users who follow these contacts will see the updates in their What's New home feed

Microsoft Dynamics CRM | ☰ Sales | ▾ What's New

NEW ACTIVITY + NEW RECORD IMPORT DATA

## what's new

POST

All records ▾ | Both Auto posts User posts

 Jon Rivers via Twitter on 10.11.2015 21:28  
New signal from Jon Rivers on Twitter: Make plans to attend the 2016 Microsoft Dynamics Technical Conference. <https://t.co/KNOUq85ngm> #MSDYNAX #MSDYNCRM #AX7  
On Jon Rivers via Twitter on 10.11.2015 21:28 's wall  
Today • 😊 You like this

 Jukka Niiranen  
Now there's an event I'd surely want to attend!  
Today

 Jon Rivers  
Contact: Created By [Jukka Niiranen](#).  
On Jon Rivers's wall  
Today

 Andrew Bibby  
Contact: Created By [Jukka Niiranen](#).  
On Andrew Bibby's wall  
Yesterday

 Mark Smith via Twitter on 9.11.2015 22:18  
New signal from Mark Smith on Twitter: "New version of Network Visualisations for Dynamics CRM" #MSdynCRM <https://t.co/HanlcFTSF>  
On Mark Smith via Twitter on 9.11.2015 22:18 's wall  
Yesterday

 leontribe  
Jukka Niiranen created [leontribe](#)  
On leontribe's wall  
5.11.2015 1:01



# Adding Social menu items to CRM Sitemap

- Make social data more prominent to CRM users by adding them into the main Nav Bar
- Use a tool like XrmToolBox to create a new sitemap area, add links to social entities, set default dashboard

Microsoft Dynamics CRM    Social | ▾    Social Activities | ▾    ⌚ + 🔎 ⌂    Jukka Niiranen Contoso ⚙️ ?

Sales    Service    Marketing    Social    Settings    Help Center

My Work    Customers    Social Data    Social Engagement

Dashboards	Accounts	Social Profiles	Open MSE
What's New	Contacts	Social Activities	
Activities		Signals	

Timeline:

Date	Message	Type	User	Score	Profile
4.11.2015 19:28	I've just seen the #Salesforce Lightning Experience. Talk about imitation being the sincerest form of flattery.	Twitter	leontribe	0,00	
4.11.2015 9:05	#MSDYNCRM Online tooling for building form URLs https://t.co/p7sODMmcy #GIF ht...	Twitter	sirjameswood	0,00	
3.11.2015 21:10	Dynamics CRM and FieldOne comes together as fork and knife for your business #MS...	Twitter	nzCRMguy	0,00	
3.11.2015 20:30	If you haven't checked out latest @PFEDynamics Blog - take a look at the new #PowerS...	Twitter	carsten_mscrm	1,00	
3.11.2015 17:00	@MSFTDynamics Lots of our @CRMUG members are excited to find out what's coming...	Twitter	AdamVero	1,00	



# Searching for social data



Microsoft Dynamics CRM | ≡ Settings | Administration

NEW ACTIVITY | NEW RECORD | IMPORT DATA

Search

\*crmug

FILTER WITH None

Accounts	Contacts	Leads	Activities	Signals
CRMUG ---- <a href="https://www.crmug.co...">https://www.crmug.co...</a>	Jerry Weinstock Dynamics CRM MVPs crminnovation	#MSDYNCrM Online vs. On-Premise vs. Partner Gus Gonzalez ----	#MSDYNCrM Online vs. On-Premise vs. Partner Gus Gonzalez Social Activity	David Pennington via Twitter on 19.10.2015 CRMUG news Twitter
Dynamic Communities, Inc. United States <a href="http://www.dynamico...">http://www.dynamico...</a>	Tony Stein CRMUG tonysteinND	48 hours until the @CRMUGUK meeting in Andrew Bibby ----	@Amway giving the #GrandRapids #CRMUG ---- Social Activity	Neil Benson via Twitter on 16.11.2015 20:28 CRMUG keeps on gro... Twitter

- Contents of Social Posts & Profiles can be searched via standard Multi-entity Quick Find
- Tip: new Relevance Search in CRM 2016 will make the social data search much smarter!
  - *#itwillbeawesome*



# Copy Twitter handles to Contact records

- Social Profiles associated to a contact will be visible in related records, via 1:N relationship
- Sometimes it might be nice to see them directly as links on the contact form, though
- You can create a workflow process for Social Profile entity to easily achieve this

Microsoft Dynamics CRM | ☰ Social | ▾ Contacts | ▾ Jukka Niiranen | ▾

+ NEW ⚏ DEACTIVATE ☰ CONNECT | ▾ 🔍 ADD TO MARKETING LIST ☰ ASSIGN 📧 EMAIL A LINK

**Summary**

CONTACT INFORMATION	
Full Name *	Jukka Niiranen
Job Title	--
Account Name	Dynamics CRM MVPs
Email	--
Business Phone	--
Mobile Phone	--

**Twitter**

Handle	jukkan
URL	<a href="http://www.twitter.com/jukkan">http://www.twitter.com/jukkan</a>

**POSTS ACTIVITIES NOTES**

All | Add Phone Call Add Task ...

**Prepare MSE presentation slides**  
Due Date 13.11.2015 8:00  
Modified by Jukka Niiranen Just now

**Jason Gumpert ; Jukka Niiranen ;**  
Discussed the agenda for MSW webcast  
Completed by Jukka Niiranen Just now

**Your Interaction Network in Microsoft**  
Posted by jukkan 25.10.2015 20:58  
Sentiment Value 0 Posted As Public Message



# Workflow process on Social Profile create

## Hide Process Properties

Process Name \* Copy Twitter Handle and URL to contact

Activate As Process

### Available to Run

Run this workflow in the background (recommended)

As an on-demand process

As a child process

### Workflow Job Retention

Automatically delete completed workflow jobs (to save disk space)

Entity Social Profile

Category Workflow

### Options for Automatic Processes

Scope Organization

Start when:  Record is created

Record status changes

Record is assigned

Record fields change

Record is deleted

Trigger the process on create of new Social Profile

### Check that Social Channel is Twitter

If Customer (Contact):Full Name contains data AND Social Profile:Social Channel equals [Twitter], then:

- Update Twitter details to contact  
Update: Customer (Contact) [View properties](#)

Contact: Information - Microsoft Dynamics CRM - Mozilla Firefox  
<https://di201510us.crm.dynamics.com/SFA/Workflow/entityform>

File

Process: Copy Twitter Handle and URL to contact

### Update Contact

Mobile Phone

Twitter

Handle

[Profile Name(Social Profile)]

URL

[Profile Link(Social Profile)]

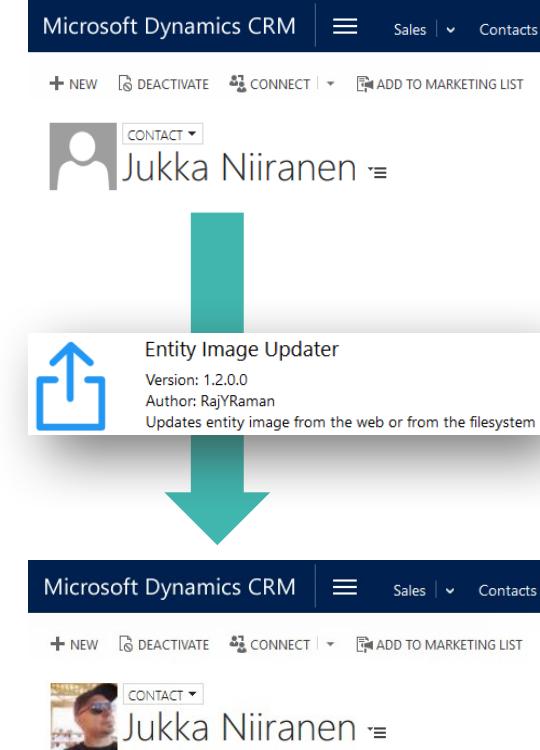
Check that the Social Profile is for the right channel

Update your custom fields on the contact



# Updating entity images

- MSE doesn't sync the social profile's user image to CRM contacts
- By storing Twitter handles on CRM contacts, we can use this data to query profile image APIs
- Entity Image Updater by [Natraj Yegnaraman](#) (for XrmToolBox) allows you to run bulk updates to selected set of contacts and match their profile images with services like Twitter, Gravatar, Clearbit, or even local folders



Get it from:  
<http://bit.ly/crmimg>



# Updating entity images (2)

XrmToolBox for Microsoft Dynamics CRM 2011/2013/2015 (v1.2015.9.22)

Connect to CRM | Manage connections | Tabs | Search | Help | Feedback | Do

Home Entity Image Updater (DI 2015-10 US) FetchXML Builder (DI 2015-10 US)

Load Entities | Update All | Selective Update |

Entities

Search

Display Name	Logical Name
Account	account
Activity	activity
Activity Party	activityparty
Attachment	attachment
Attachment Party	attachmentparty
Attribute	attribute
Attribute Group	attributegroup
Campaign Response	campaignresponse
Case	incident
Case Resolution	incidentresolution
Collaboration	msdyn_collaboration
Competitor	competitor
Competitor Address	competitoraddress
Connection	connection
Connection Role	connectionrole
Contact	contact
Contract	contract
Contract Line	contractdetail
Contract Template	contracttemplate
Currency	transactioncurrency

Logo For

URL  Email  Twitter

Local Folder

Logo retrieved from

twitter.com

Attribute to match

Attribute Name	Schema Name
Twitter Handle	new_TwitterHandle
Twitter	int_TwitterService
Twitter	int_Twitter
Facebook	int_Facebook

Results

Display Name	Logical Name	Image
crmanswers	contact	[Image]
TesTeppo	contact	[Image]
sirjameswood	contact	[Image]
AndrewBibby	contact	[Image]
HarvCRM	contact	[Image]
carsten_mscrm	contact	[Image]
Ieontribe	contact	[Image]
demian_rasko	contact	[Image]
briangalicia	contact	[Image]
TanguyTOUZARD	contact	[Image]
JoelLindstrom	contact	[Image]
crminnovation	contact	[Image]
inogic	contact	[Image]
andz_88	contact	[Image]

Success

16 images updated

OK

1. Select field to use for profile image matching

2. Limit the target contacts with FetchXML query criteria, if needed

3. Matched images are updated to CRM records

Connected to 'crm.dynamics.com (Contoso)' ▾



# Embedding external profiles to CRM forms

- Having social profile names stored on contact also enables using them in form scripts, to dynamically retrieve data from external websites or widgets
- Example: add an iFrame to contact form, use OnLoad script to open [https://klout.com/\[profile\]](https://klout.com/[profile]) to view the customer's social influence score & areas of expertise

```
function setKloutIFrameURL() {
    var IFrame = Xrm.Page.ui.controls.get("IFRAME_Klout");
    var twitterHandle =
        Xrm.Page.data.entity.attributes.get("new_twitterhandle").getValue();
    var newTarget= "https://klout.com/"+twitterHandle;
    IFrame.setSrc(newTarget);
}
```

The screenshot shows a Microsoft Dynamics CRM contact record for 'Jukka Niiranen'. The contact card displays a photo of Jukka Niiranen, his name, and a Klout score of 61. Below the card, there are sections for 'Summary' and 'Details'. A sidebar on the left lists 'Twitter' and 'Klout'. The main content area features a 'Be known for what you love.' section with a 'Learn More' link and social media sign-in buttons for Facebook, Twitter, and Email. To the right, a detailed profile for 'Jukka Niiranen' is shown, including his title as a Microsoft Dynamics CRM MVP, his working location at @Digillustrated, and his social media presence across various platforms. A list of his expertise areas is also provided.

**Jukka Niiranen**  
Microsoft Dynamics CRM MVP. Working at @Digillustrated as #MSDYNCRM Consultant. Just your average non-developer geek, really. Thanks for following.

CRM ★ Expert, Finland ★ Expert, Helsinki ★ Expert, Microsoft ★ Expert  
Microsoft SQL Server ★ Expert, Microsoft Windows ★ Expert, Nokia ★ Expert  
Project Management ★ Expert, SaaS ★ Expert, SQL ★ Expert  
SQL Server ★ Expert, Salesforce ★ Expert, Software Development ★ Expert  
User Groups ★ Expert, Databases, Microsoft Sharepoint, Office 365  
Social CRM, User Experience Design



# Thanks for your time!

For more Social Engagement and  
Dynamics CRM related content,  
visit <http://survivingcrm.com/>



# Keep on #MSDynCRM:ing!



#MSDYNCRM ▾ 🔎    ⏷    Month 10/16/2015 - 11/15/2015    6.5k posts ➔

**OVERVIEW**

SENTIMENT

8.2 index    8.2 change ➔

LOCATION INSIGHTS

TWITTER HASHTAGS

Hashtag	Count
#msdynCRM	6,510 ➔
#crm	713 ➔
#msdynamics	287 ➔
#job	253 ➔
#crm2016	185 ➔

SOURCES

PHRASES

#msdynerp   #salesforce  
customer service   release   ms dynamics crm  
@msftdynamics   microsoft dynamics   check via crm #msdynCRM  
ms   top   online   #crm   tip   crm   using   #job   data  
integration   microsoft dynamics crm   #msdynamics   service  
nzcrmguy   dynamics crm   dynamics   knowledge  
marketing   new #job   #msdynCRM   #msdynamics   experience  
#msdynCRM   online   #msdynCRM   #crm   #msCRM  
#crm   #msdynCRM   #msdynCRM   #crm2015   update  
#msdynCRM   #crm2016

PHRASES HISTORY

TRENDING PHRASES

get #msdynCRM #msdynamics  
using microsoft dynamics crm tip  
via move access team  
new #job update  
service #msdynCRM #crm

PHRASES ON TWITTER

using   dynamics   microsoft dynamics  
#msdynamics   crm   tip  
new #job   #msdynCRM   #crm   online  
dynamics crm   #job  
#msdynCRM   #msdynamics

LANGUAGES

English   6,510 ➔