



Sitecore CMS Modules

Microsoft Dynamics CRM

Campaign Integration -

New features

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Chapter 1

Microsoft Dynamics CRM Campaign Integration

Sitecore's Microsoft Dynamics CRM Campaign Integration allows you to enrich the information in your CRM with specific knowledge gained from their visits to your website. You can also create new leads, contacts and accounts in the CRM automatically based on information gained during website visits.

The Dynamics CRM integration consists of the Dynamics CRM Security Provider 1.1. and the Dynamics CRM Save Actions for the Web Forms for Marketers module.

The main purpose of the Web Forms for Marketers 2.1 release is to enhance the existing functionality of the module in order to ensure that marketers are given the tools to solve the vast majority of challenges associated with creating effective forms.

The new features are mainly focused on giving the marketer full and complete control over the user experience, and being able to modify specific aspects of the form and its subsequent actions to effectively target different visitor groups and segments. The new release also further enhances the marketers ability to attach complex and targeted business logic to the form, to ensure the best experience for each visitor, and to maximize the return on the information the visitor has provided.

1.1 Microsoft Dynamics CRM Security Provider 1.1 – new features.

The Microsoft Dynamics CRM Security Provider allows you to manage the vital customer data stored in your CRM system directly in Sitecore. It allows seamless integration and access between your CRM system and your Sitecore website.

The CRM Security Provider module used CRM web services to represent data from the Microsoft CRM System as security objects in Sitecore. In Sitecore, CRM contacts are rendered as users and CRM marketing lists as roles.

Version 1.1 of the module brings a number of enhancements.

1.1.1 Dynamics CRM V 4 and later support

The module now supports Microsoft Dynamics CRM v 4.0 and later versions.

This allows us to take advantage of the numerous improvements in this version, including the ability to manage and modify metadata via the CRM services.

Dynamics CRM 4.0 contains significant performance improvements, particularly in the web services used by Sitecore's Dynamics CRM Security Provider.

Dynamics CRM 2011 provides you with a wide range of benefits, including point-and-click configurability, enterprise scalability, and easy interoperability to existing applications and databases.

The module is still backward compatible with version 3 of Dynamics CRM.

1.1.2 CRM Online support

The module has been tested, verified and optimized for use with CRM Online.

1.1.3 Performance improvements

In addition to leveraging the performance enhancements in Dynamics CRM 4.0, additional performance improvements have been made.

Optimized caching and other improvements have improved performance of the module by up to 450%.

Successful scalability testing has also been conducted for up to 1.000.000 CRM users.

1.1.4 Increased configurability

It is now possible to add a password field to the contacts entity in CRM;

Users are now able to utilize all the connection properties that CRM provides in the module to optimize the connection to their CRM configuration.

1.1.5 Other enhancements

Additional functionality for conditional debugging in the provider has been added.

Several minor bugs have been fixed.

1.2 Microsoft Dynamics CRM Save Actions

The Microsoft Dynamics CRM Save Actions for Web Forms for Marketers gives you a direct and automatic link between the information visitors provide on your website and your Dynamics CRM.

Save Actions in Web Forms for Marketers allow you to act on information submitted by the user in forms. The Dynamics CRM Save Actions gives marketing and business users the ability to create and update information automatically in CRM when a form is submitted. You can also create complex business logic based on information already in the CRM, and on information given in the form

1.2.1 Dynamics CRM prerequisites.

The Dynamics CRM Save Actions use the Dynamics CRM web services for integration. This is Microsoft's recommended integration method.

The Save Actions require Microsoft Dynamics version 4.0 or later.

1.2.2 Create and Update CRM Contacts and Accounts

The Dynamics CRM Save Actions allow you to create a new contact or account in CRM when a form is successfully submitted by a visitor, and populate required and any other fields in the contact or account.

If an account or contact already exists, the record will be updated with the required information, if desired. These are the only types of CRM records which can be updated using the Save Actions.

1.2.3 Create any CRM entity

The Save Actions allow you to create any type of record in the CRM. The user can choose the type of record to create, and populate any fields in the record.

1.2.4 Ensure integrity of information

The Save Actions dynamically interact with the CRM system to help users ensure the integrity of the information. It automatically reads and respects required fields for all CRM entities. It also displays the recommended fields for an entity.

The Save Actions allow you to update any updatable field. They also read and respect the fields types, so it is only possible for the user to enter information in the right format.

In addition, CRM lookup fields, which can contain links to other entities in the CRM can also be updated via the Save Actions.

1.2.5 Conditional and complex business logic

The Save Actions allow the user to fill in fields based on conditional and complex business logic.

Depending on the field type, CRM fields can be updated with custom text strings, using existing values in the CRM, with information entered into the form by the visitor and with information from other Save Actions. This allows you, for example to create

an account and a new contact to that account all based on information provided in a single form.

You can also base the creation and modification of CRM records on a single or multiple values selected in checkbox and list fields in the form.

1.2.6 Auditing

In order to keep track of the automatic updates made using the Save Actions, auditing information can be entered which records what changes have been made, and what values have been added or modified when updating records.