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Scribe SolutionPak: ExactTarget and Dynamics CRM

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Publishing Information

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Scribe SolutionPak: ExactTarget and Dynamics CRM

Welcome to Scribe's SolutionPak for ExactTarget and Dynamics CRM. This SolutionPak synchronizes leads and contacts in Dynamics CRM to subscribers in ExactTarget, allowing you to execute email campaigns for these subscribers. As campaign metrics become available in ExactTarget, they can be integrated back to Dynamics CRM.

Introduction

This document describes using two Scribe Online Solution Instances, one to manage subscriber and list data, and a second for sends and metrics. Data is synchronized between ExactTarget and Dynamics CRM as shown:
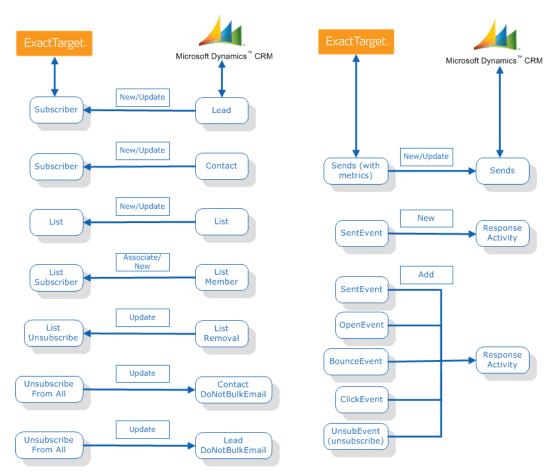

Scribe SolutionPak: ExactTarget and Dynamics CRM

About the Scribe SolutionPak: ExactTarget and Dynamics CRM

This SolutionPak is available from the Scribe Downloads page as a downloadable ZIP file called ScribeSolutionPak-ExactTarget-DynamicsCRM_v1_2.zip.

SolutionPak contents

The ScribeSolutionPak-ExactTarget-DynamicsCRM_v1_2.zip file includes:

- **ExactTarget-DynamicsCRM-SendsAndMetrics.xml** — An XML file containing the Scribe Online IS maps that define the mappings between ExactTarget sends and metrics data and Dynamics CRM. You import this file into your Scribe Online Solution Instance.
- **ExactTarget-DynamicsCRM-SubscribersAndLists.xml** — An XML file containing the Scribe Online IS maps that define the mappings from Dynamics CRM leads, contacts, and lists to ExactTarget subscriber and list data. You import this file into your Scribe Online Solution Instance.
- **ScribeForExactTarget_1_0_0_managed.zip** — The Dynamics CRM custom solution file. You import this managed Solution into Dynamics CRM.

This SolutionPak creates the following in Dynamics CRM:

- A security role — ScribeExactTarget
- A plugin — Scribe.Connector.ExactTarget.Plugin
- An entity — scribeexacttargetchangehistory

These are used to manage the tracking of member removals from lists.

Requirements

In addition to the SolutionPak, your site needs:

- A subscription (trial or paid) to Scribe Online Integration Service (IS).
- A subscription to an ExactTarget Advanced Edition with a subscriber key.

> 📝 Using the SolutionPak with any other ExactTarget Edition is not supported.

- A Dynamics CRM 2011 On-Premise or Dynamics CRM 2013 Online or On-Premise system.
- A Dynamics CRM managed Solution from ExactTarget for your Dynamics CRM 2011 implementation. Contact your ExactTarget representative for access to the correct Dynamics CRM managed Solution.

> 📝 This SolutionPak was designed for and tested with version 5.0.373.108558 of the ExactTarget managed Solution. Scribe cannot guarantee results with other versions of the ExactTarget managed Solution.

Preparing the SolutionPak

This section describes the high-level tasks for creating a Scribe Online Solution. For more information about a task or Scribe Online, see the Scribe Online Help Center.

Download and extract the files from the zip file

1. Download **ScribeSolutionPak-ExactTarget-DynamicsCRM_v1_2.zip** from the Scribe Products Download page.

2. Extract the files to a folder accessible by Scribe Online and Dynamics CRM.

Import the Dynamics CRM managed solution

1. Import the **ScribeForExactTarget_1_0_0_managed.zip** managed Solution into Dynamics CRM. This creates a ScribeExactTarget role.

   The ScribeForExactTarget_1_0_0_managed.zip file is for Dynamics CRM 2011 On-Premise, and Dynamics CRM 2013 On-Premise and Online.

2. Verify that the flag to enable SDK message processing steps is selected.

3. Assign the ScribeExactTarget role to the ignore user and any users who will work with contacts, leads, contact lists, lead lists, or list members.

4. Import the **ExactTarget2011-managed-*version*.zip** managed Solution (from ExactTarget) into Dynamics CRM, where *version* is the ExactTarget version in *n.n.nnn.nnnnnn* format. This is used for CRM2011 On-Premise, CRM2013 Online, or CRM 2013 On-Premise.

   > The ExactTarget file name includes 2011. Release notes indicate that this version was verified to work with Dynamics CRM 2013.

5. Copy the following XML files to a directory under your Scribe Online installation, such as ..\Scribe Software\Scribe Online Agent\Maps\:
   - **ExactTarget-DynamicsCRM-SendsAndMetrics.xml**
   - **ExactTarget-DynamicsCRM-SubscribersAndLists.xml**

6. Create a Scribe Online IS Solution Instance.

   > This SolutionPak contains two XML files, each with a set of maps. You can import the XML files into one Solution Instance and schedule the Solution as a single entity, or import each XML file into separate Solution Instances and schedule the instances separately.
   >
   > For example, to schedule the instances separately, import ExactTarget-DynamicsCRM-SendsAndMetrics into a Sends_Metrics Solution Instance and import ExactTarget-DynamicsCRM-SubscribersAndLists into a Subscribers_Lists Solution Instance.

Configuring the Scribe Online Connections

For this SolutionPak, Scribe recommends creating your connections from the Connections page, as you must assign these global connections to each map. For information, see Adding Scribe Online IS connections.

Two connections are requried for this SolutionPak:

- **ExactTarget** — For information, see Connecting to ExactTarget.

  > This SolutionPak is designed for ExactTarget accounts where the Subscriber Primary Key is a Subscriber Key.

- **Dynamics CRM Connection** — For information, see Connecting to Microsoft Dynamics CRM.

  The Dynamics CRM user must be an ignore user, which is not used to capture Dynamics CRM changes.

  To prevent bounce back messages from Dynamics CRM for records updated by the SolutionPak, use Query Block filters and configure the connection with an ignore user.

  If you are using an existing Dynamics CRM Connection, refresh the metadata as described in Managing your Connections to ensure that you capture the new Dynamics CRM entities introduced by the ExactTarget and Scribe ExactTarget managed Solutions.

Configuring the Scribe Online Solution Instances

After you create Scribe Online Connections, configure Solution Instances. This SolutionPak describes configuring two Solution Instances: one to manage subscribers and lists and one to manage sends and metrics. If you prefer, you can configure the maps in one Solution Instance.

> Do not change the order of maps within the Solution Instances. Some Solution Instances depend on the maps running in an expected order.
>
> Scribe suggests that you leave the schedule set to On Demand until you have implemented and tested the SolutionPak.

Configure the subscribers and lists solution instance

1. Configure **Step 1** and **Step 2** of the Solution Instance. (See Configuring a Scribe Online IS Solution Instance.)

2. On **Step 3, Defining a Map**, click **Import**, browse to and import the **ExactTarget-DynamicsCRM-SubscribersAndLists.xml** file, which contains the maps for this Solution Instance. (See Exporting and Importing Maps.)

   > The maps you import show as Incomplete.

3. Open each map, select the source and target connections, and make any changes needed to the map to suit your business requirements.

   > For the CRM List Member removal to ET List unsubscribe map, the following warning can be ignored for the Update ET ListSubscriber block: Scribe recommends using lookup blocks with Advanced IS maps.
   >
   > Lookup blocks were not available when these maps were created. You may change the map to use a lookup block, but it is not necessary.

Filters for Dynamics CRM source connections

When the Solution Instance updates the Dynamics CRM records, the modifiedby field is updated with the GUID of the Run As User entered in the Scribe Online Dynamics CRM connection (the ignore user). Publishing these records from Dynamics CRM creates an infinite loop and does not produce the desired results.

To prevent this scenario, add a filter to the Dynamics CRM Source Connection maps that filters out records where the modifiedby field contains the ignore user's GUID for the Dynamics CRM connection.

To create the filter for each map

1. For each of the following maps, open the Query block, click the **Filter** tab, and select the filter with the **modifiedby** field:
   - **CRM Lead to ET Subscriber**
   - **CRM Contact to ET Subscriber**
   - **CRM List Member to ET List Subscriber**
   - **CRM List Member removal to ET List unsubscribe**

Modifiedby in Filter Tab - Dynamics CRM

2. Change the **<CRM Integration User Id>** to the UserID or Unique Identifier for the User specified in the selected Dynamics CRM Connection:

   ```
   modifiedby is not equal to <UserID>
   ```

   For example:

   ```
   modifiedby is not equal to "AF9DA746-5D3C-E111-AFD1-000C29403850"
   ```

   > 💡 By default, Solution Instances only run on demand.
   >
   > After you understand the integration requirements for this SolutionPak, you can schedule the Solution Instance (Step 4) to run automatically. (See Scheduling your Solution Instance.)

Configure the Sends and Metrics Solution Instance

1. Configure **Step 1** and **Step 2** of the Solution Instance as described in Configuring a Scribe Online IS Solution Instance.

2. On **Step 3, Defining a Map**, click **Import**, and then browse to and import the **ExactTarget-DynamicsCRM-SendsAndMetrics.xml** file that contains the maps for this Solution Instance. For more information, see Exporting and Importing Maps.

> The maps you import show as Incomplete.

3. Open each map and select the source and target connections and, if needed, make changes to the maps to suit your business requirements.

> By default, Solution Instances only run on demand.
>
> After you understand the integration requirements for this SolutionPak, you can schedule the Solution Instance (Step 4) to run automatically. (See Scheduling your Solution Instance.)

ExactTarget and Dynamics CRM Maps

This section provides details about the maps for Subscribers and Lists, and for Sends and Metrics included in this SolutionPak. For more information on the specific field mappings, review the maps in Scribe Online.

Subscribers and Lists Maps

- **CRM Lead to ET Subscriber** — Creates or updates ExactTarget subscribers from new or updated leads in Dynamics CRM.
- **CRM Contact to ET Subscriber** — Creates or updates ExactTarget subscribers from new or updated contacts in Dynamics CRM.
- **CRM List to ET List** — Creates or updates lists in ExactTarget from new or updated lists in Dynamics CRM.
- **CRM List Member to ET List Subscriber** — Creates list subscribers in ExactTarget from list members in Dynamics CRM.
- **CRM List Member removal to ET List unsubscribe** — Unsubscribes from ExactTarget lists a list member removed in Dynamics CRM.
- **CRM Maintenance: Delete change history records** — Deletes records older than 1 month from the custom change history table in Dynamics CRM.
- **ET Subscriber Global Opt-Out to CRM Contact DoNotAllowBulkEmail** — Sets the DoNotBulkEmail flag for the Dynamics CRM contact to true from a global unsubscribe in ExactTarget.
- **ET Subscriber Global Opt-Out to CRM Lead DoNotAllowBulkEmail** — Sets the DoNotBulkEmail flag for the Dynamics CRM lead to true from a global unsubscribe in ExactTarget.

Sends and Metrics Maps

- **ET Send to CRM Send Metrics** — Creates or updates send metrics in Dynamics CRM from ExactTarget sends.
- **ET SentEvent to CRM Response Activity** — Creates a response activity in Dynamics CRM related to each Subscriber on an ExactTarget send.
- **SentEvent to CRM** — Adds sent events to a response activity in Dynamics CRM from an ExactTarget sent event.
- **OpenEvent to CRM** — Adds open events to a response activity in Dynamics CRM from an ExactTarget open event.
- **BounceEvent to CRM** — Adds bounce events to a response activity in Dynamics CRM from an ExactTarget bounce event.
- **ClickEvent to CRM** — Adds click events to a response activity in Dynamics CRM from an ExactTarget click event.
- **UnsubEvent to CRM** — Adds unsubscribed events to a response activity in Dynamics CRM from an ExactTarget unsubscribed event.

Additional notes and known issues

This SolutionPak was designed to be flexible in a variety of business use cases. You may need to modify the maps to support your specific business process.

Making schema changes

After you create your connections, if you make changes to either the ExactTarget or Dynamics CRM schemas (to add attributes or custom fields, for example), you must refresh the metadata for any ExactTarget or Dynamics CRM Connections. (See Editing your Connections.)

In addition, open each map that references the connection to ensure the changes are reflected in the Scribe Online map.

Using the Dynamics CRM Advanced Find feature

Due to limitations of the Dynamics CRM SDK, deletes of list members in Dynamics CRM will not be synchronized to ExactTarget lists if you use the Remove all members returned by the search from the marketing list option in Dynamics CRM. This option is accessed from the Manage Members dialog by selecting **Use Advanced Find to remove members** and then selecting **Remove all the members returned by the search from the marketing list**.

Removing leads or contacts from Dynamics CRM

If you remove a lead or contact from a list in Dynamics CRM, the subscriber is unsubscribed from the corresponding list in ExactTarget.

However, due to ExactTarget API functionality, if you add the lead or contact back to the list in Dynamics CRM, the corresponding subscriber is not subscribed back to the list in ExactTarget.

Dynamic lists in Dynamics CRM

If you create a dynamic list in Dynamics CRM, a list is created in ExactTarget without any subscribers assigned. Dynamic lists do not have a permanent list of members assigned.

Creating ExactTarget Events in Dynamics CRM

When you create an ExactTarget event in Dynamics CRM, you may receive the following error:

```
Error description: Operation failed. Label: Create CRM ET
Event, Name: et_eventCreate, Message: Unable to insert data
into the et_event entity. Index was out of range. Must be non-
negative and less than the size of the collection.

Parameter name: index
```

To resolve this error:

1. In Dynamics CRM, navigate to **Settings**.
2. Click **Customizations**.
3. Click **Customize the System**.
4. Select **SDK Message Processing Steps**.
5. Select **ExactTarget.Crm.Plugins.CreateEventUpdatedDates: Create of et_event**.
6. Click **Deactivate**.
7. Click **Save**.
8. Click **Publish All Customizations**.
9. Click **Save and Close**.