

Email2CRM – Custom Fields Mappings

V1.0

Integrated email messaging with web analytics



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Custom Fields Mappings

Email2CRM supports the mappings of fields from CRM to the VerticalResponse System so that these fields can be used in the email message to personalize the content.

Built into the system are up to 18 fields that automatically map from CRM to the VR system. However, depending on whether a Contact, Lead or Account record is being mapped to VR not all the fields are mappable. A list of the specific fields that are mapped by entity type is in Appendix A.

Out of the box, the following fields are mapped for you.

- Email Address
- First Name
- Last Name
- Title
- Company Name
- Address Line 1
- Address Line 2
- City
- State/Province
- Country
- Work Phone
- Home Phone
- Fax
- Marital Status
- Gender

Specifics by each entity type – Lead, Contact, and Account are in Appendix A.

Create Custom Mapping Fields

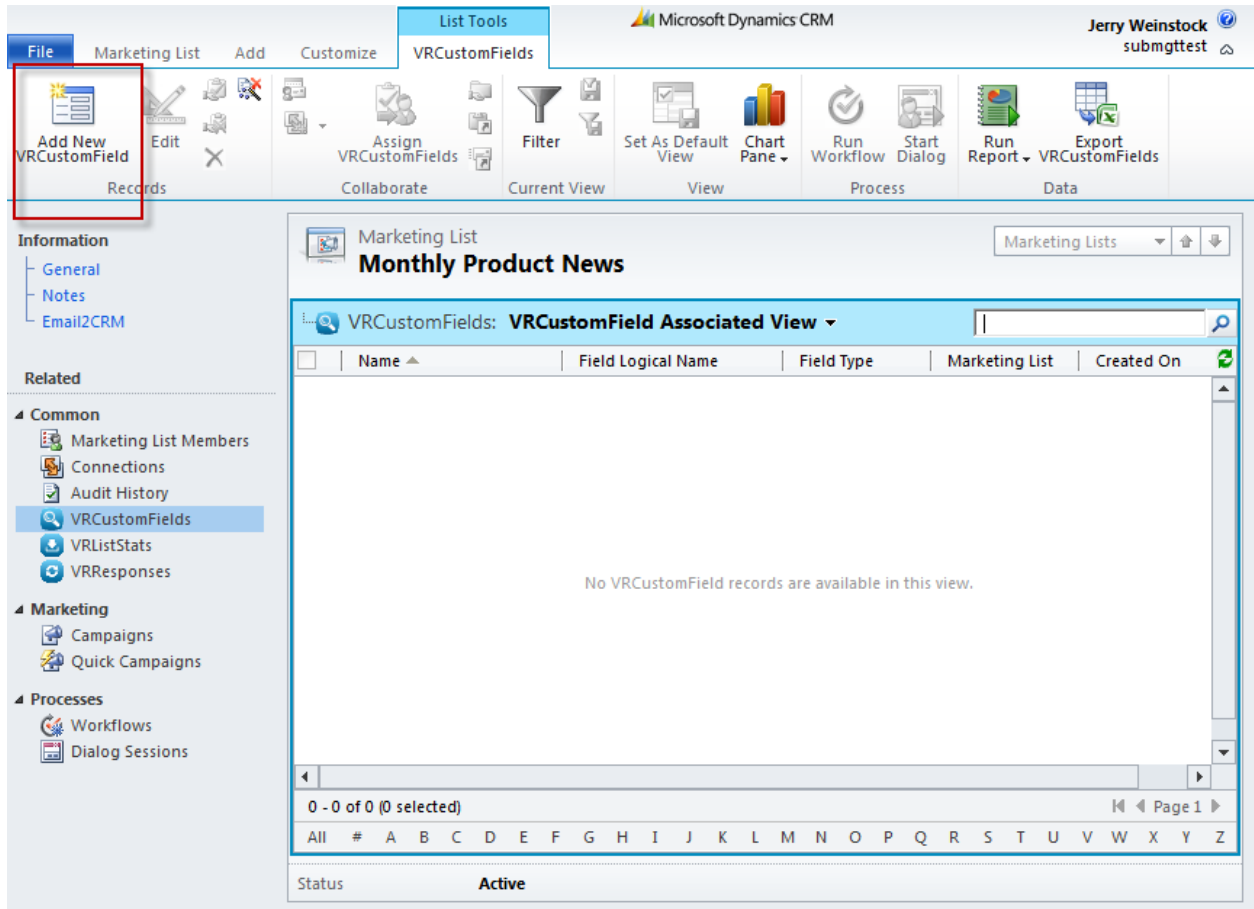
Custom mapping fields are Marketing List specific so the first step is to open up the Marketing list record for which you want to create custom fields.

The screenshot displays the Microsoft Dynamics CRM interface for a Marketing List record. The record is titled "Monthly Product News" and is currently active. The interface includes a ribbon with tabs for "File", "Marketing List", "Add", and "Customize". The ribbon contains various action groups such as "Save", "Actions", "Collaborate", "Process", and "Data".

On the left side, there is a navigation pane with sections for "Information", "Related", "Common", "Marketing", and "Processes". Under the "Related" section, the "VRCustomFields" option is highlighted with a red rectangular box. Other options in this section include "Marketing List Members", "Connections", "Audit History", "VRListStats", and "VRResponses".

The main area of the interface shows the details for the "Monthly Product News" Marketing List. The "General" section includes fields for Name (Monthly Product News), Member Type (Contact), Purpose (news about our products), Source, Currency (US Dollar), Cost (\$), Locked (No), and Owner (Jerry Weinstock). The "Description" section contains the text "Monthly Product News Letter". The status of the Marketing List is shown as "Active".

On the form, select the VRCustomFields associated view link to open up the view for the custom fields.



When this view is displayed select Add New VRCustomField from the ribbon bar. The new record form will open up as shown.

There are three pieces of information to enter to create the record.

1. Display Name – this is the name of the field as it will be displayed in VR inside the brackets that you use as the placeholder i.e. {displayname}. Do not use one of the ‘reserved’ names that are already in use – see Appendix A. Likewise, do not use the same Display Name for another custom field in the same list.
2. Field Logical Name – this is the Schema name of the field from the CRM system. It is not the name of the field that is displayed on the form to the user. You will need to be a system customizer or crm admin role in your CRM system to get the correct information.
3. Field Type – this is the field type from the CRM system.

Appendix A includes display and logical names that you would use for items 2&3 for the out of the box account, contact, and lead forms.

Once you enter these three items you can either Save and Close the record if you are done or Save and New if you have additional custom fields to enter.

The system will support up to 200 custom fields per marketing list. The custom fields can be different between marketing lists.

After you have created the custom fields the fields will be published to the VR system along with the corresponding CRM data:

1. Through the normal background sync that occurs 4x per day 7 days a week.

2. Via the Sync now on demand function if you select the Full Sync option from the Sync Mode picklist.

Appendix A

VRCustomField Logical Field Names and Reserve Field Names Charts:

Reserve Field Names:

Reserve Field Display Names		
Address Line 1	Fax	Record Created
Address Line 2	First Name	State/Province
Company Name	Gender	Title
Country	Home Phone	Work Phone
CrmKey	Last Name	Zip/Postal Code
CrmRecordType	Marital Status	
Email Address	Mobile Phone	

Account:

Already Mapped Fields (Default Form):

Field Name	VR Field	CRM Type
Account Name	Company Name	Text/Nvarchar
Primary Contact	First Name, Last Name	Text/Nvarchar
Main Phone	Work Phone	Text/Nvarchar
Other Phone	Mobile Phone	Text/Nvarchar
Fax	Fax	Text/Nvarchar
E-mail	Email Address	Text/Nvarchar
Street 1	Address Line 1	Text/Nvarchar
Street 2	Address Line 2	Text/Nvarchar
City	City	Text/Nvarchar
State/Province	State/Province	Text/Nvarchar
ZIP/Postal Code	ZIP/Postal Code	Text/Nvarchar
Country/Region	Country	Text/Nvarchar

Unmapped Fields (Default Form):

CRM Form Field Name	Field Logical Name	Field Type
Account Number	accountnumber	Text/Nvarchar
Parent Account	parentaccountid	Lookup
Relationship Type	customertypecode	Picklist/Option Set
Currency	transactioncurrencyid	Lookup
Website	websiteurl	Text/Nvarchar
Address Name	address1_name	Text/Nvarchar

Street 3	address1_line3	Text/Nvarchar
Phone	address1_telephone1	Text/Nvarchar
Address Type	address1_addresstypecode	Picklist/Option Set
Shipping Method	shippingmethodcode	Picklist/Option Set
Freight Terms	address1_freighttermscode	Picklist/Option Set
Territory	territoryid	Lookup
Category	accountcategorycode	Picklist/Option Set
Industry	industrycode	Picklist/Option Set
Annual Revenue	revenue	Money
No. of Employees	numberofemployees	Whole Number/Int
SIC Code	sic	Text/Nvarchar
Ownership	ownershipcode	Picklist/Option Set
Description	description	Text/Nvarchar
Owner	ownerid	Lookup
Originating Lead	originatingleadid	Lookup
Credit Limit	creditlimit	Currency
Credit Hold	credithold	True-False/Bit
Payment Terms	paymenttermscode	Picklist/Option Set
Price List	defaultpricelevelid	Lookup
Preferred Method of Contact	preferredcontactmethodcode	Picklist/Option Set
E-mail(Contact Methods)	donotemail	True-False/Bit
Bulk E-mail	donotbulkemail	True-False/Bit
Phone (Contact Methods)	donotphone	True-False/Bit
Fax (Contact Methods)	donotfax	True-False/Bit
Mail	donotpostalmail	True-False/Bit
Send Marketing Materials	donotsendmm	True-False/Bit
Last Date Included in Campaign	lastuserincampaign	Date Time
Preferred Time	preferredappointmenttimecode	Picklist/Option Set
Preferred Day	preferredappointmentdaycode	Picklist/Option Set
Preferred Service	preferredserviceid	Lookup
Preferred Facility/Equipment	preferredequipmentid	Lookup
Preferred User	preferredsystemuserid	Lookup

Contact:

Already Mapped Fields (Default Form):

Field Name	VR Field	CRM Type
First Name	First Name	Text/Nvarchar
Last Name	Last Name	Text/Nvarchar
Job Title	Title	Text/Nvarchar
Parent Customer	Company	Text/Nvarchar
Business Phone	Work Phone	Text/Nvarchar
Home Phone	Home Phone	Text/Nvarchar
Gender	Gender	Picklist/Option Set
Marital Status	Marital Status	PickList/Option Set
Mobile Phone	Mobile Phone	Text/Nvarchar

Fax	Fax	Text/Nvarchar
E-mail	Email Address	Text/Nvarchar
Street 1	Address Line 1	Text/Nvarchar
Street 2	Address Line 2	Text/Nvarchar
City	City	Text/Nvarchar
State/Province	State/Province	Text/Nvarchar
ZIP/Postal Code	ZIP/Postal Code	Text/Nvarchar
Country/Region	Country	Text/Nvarchar

Unmapped Fields (Default Form):

CRM Form Field Name	Field Logical Name	Field Type
Salutation	salutation	Text/Nvarchar
Middle Name	middlename	Text/Nvarchar
Currency	transactioncurrencyid	Lookup
Pager	pager	Text/Nvarchar
Website	websiteurl	Text/Nvarchar
Address Name	address1_name	Text/Nvarchar
Street 3	address1_line3	Text/Nvarchar
Phone	address1_telephone1	Text/Nvarchar
Address Type	address1_addresstypecode	Picklist/Option Set
Freight Terms	address1_freighttermscode	Picklist/Option Set
Department	department	Text/Nvarchar
Role	accountrolecode	Picklist/Option Set
Manager	managername	Text/Nvarchar
Manager Phone	managerphone	Text/Nvarchar
Assistant	assistantname	Text/Nvarchar
Assistant Phone	assistantphone	Text/Nvarchar
Spouse/Partner Name	spousename	Text/Nvarchar
Birthday	birthdate	Date Time
Anniversary	anniversary	Date Time
Owner	ownerid	Lookup
Originating Lead	originatingleadid	Lookup
Credit Limit	creditlimit	Money
Credit Hold	credithold	True-False/Bit
Payment Terms	paymenttermscode	Picklist/Option Set
Price List	defaultpricelevelid	Lookup
Preferred Method of Contact	preferredcontactmethodcode	Picklist/Option Set
E-mail (Contact Methods)	donotemail	True-False/Bit
Bulk E-mail	donotbulkemail	True-False/Bit
Phone (Contact Methods)	donotphone	True-False/Bit
Fax (Contact Methods)	donotfax	True-False/Bit
Mail	donotpostalmail	True-False/Bit
Send Marketing Materials	donotsendmm	True-False/Bit
Last Date Included in Campaign	lastuserincampaign	Date Time
Preferred Time	preferredappointmenttimecode	Picklist/Option Set
Preferred Day	preferredappointmentdaycode	Picklist/Option Set

Preferred Service	preferredserviceid	Lookup
Preferred Facility/Equipment	preferredequipmentid	Lookup
Preferred User	preferredsystemuserid	Lookup

Lead:

Already Mapped Fields (Default Form):

Field Name	VR Field	CRM Type
First Name	First Name	Text/Nvarchar
Last Name	Last Name	Text/Nvarchar
Job Title	Title	Text/Nvarchar
Company Name	Company	Text/Nvarchar
Business Phone	Work Phone	Text/Nvarchar
Home Phone	Home Phone	Text/Nvarchar
Mobile Phone	Mobile Phone	Text/Nvarchar
Fax	Fax	Text/Nvarchar
E-mail	Email Address	Text/Nvarchar
Street 1	Address Line 1	Text/Nvarchar
Street 2	Address Line 2	Text/Nvarchar
City	City	Text/Nvarchar
State/Province	State/Province	Text/Nvarchar
ZIP/Postal Code	ZIP/Postal Code	Text/Nvarchar
Country/Region	Country	Text/Nvarchar

Unmapped Fields (Default Form):

CRM Form Field Name	Field Logical Name	Field Type
Salutation	salutation	Text/Nvarchar
Middle Name	middlename	Text/Nvarchar
Currency	transactioncurrencyid	Lookup
Pager	pager	Text/Nvarchar
Website	websiteurl	Text/Nvarchar
Industry	industrycode	Picklist/Option Set
Annual Revenue	revenue	Money
No. of Employees	numberofemployees	Whole Number/Int
SIC Code	sic	Text/Nvarchar
Street 3	address1_line3	Text/Nvarchar
Owner	ownerid	Lookup
Credit Limit	creditlimit	Money
Credit Hold	credithold	True-False/Bit
Payment Terms	paymenttermscode	Picklist/Option Set
Price List	defaultpricelevelid	Lookup
Preferred Method of Contact	preferredcontactmethodcode	Picklist/Option Set
E-mail (Contact Methods)	donotemail	True-False/Bit

Bulk E-mail	donotbulkemail	True-False/Bit
Phone (Contact Methods)	donotphone	True-False/Bit
Fax (Contact Methods)	donotfax	True-False/Bit
Mail	donotpostalmail	True-False/Bit
Send Marketing Materials	donotsendmm	True-False/Bit
Last Date Included in Campaign	lastuserincampaign	Date Time
Preferred Time	preferredappointmenttimecode	Picklist/Option Set
Preferred Day	preferredappointmentdaycode	Picklist/Option Set
Preferred Service	preferredserviceid	Lookup
Preferred Facility/Equipment	preferredequipmentid	Lookup
Preferred User	preferredsystemuserid	Lookup
Description	description	Text/Nvarchar
Owner	ownerid	Lookup
Lead Source	leadsourcecode	Picklist/Option Set
Source Campaign	campaignid	Lookup