

Email2CRM™ Marketing List Synchronization

V1.0

Updated methodology for Marketing List to VR Synchronization



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Email2CRM Marketing List Synchronization

Effect April 25, 2011, the Email2CRM Marketing List Synchronization process is receiving a major enhancement upgrade. Once your CRM system has been upgraded, it will benefit from this new synchronization process. All new installations after this date will include this functionality.

Prior to this release the hosted application was connecting to a CRM organization database approximately once per hour 24 times a day, 7 days a week. At that time a determination would be made if there were any differences between the CRM Marketing List(s) that were enabled for sync with VR and the respective VR member list. If there were, the membership lists were reconciled; and if not, the connection would be closed and it would be revisited about 1 hour later.

The new system will reduce the frequency of the automated background sync schedule while providing Marketing List owners the capability to kick off the sync when required using a Sync Now feature. The features are as follows:

1. Background Sync will occur 4x per day, 7 days a week (i.e. approximately every 6 hours). This should then result in automatic updates occurring twice during the business day.
2. Manual Sync – these can be initiated as frequently as the Marketing List manager requires. The list sync process will be initiated immediately, and the list owner will receive an email with list sync details once the sync process is completed.

Manual list sync can occur in as little as 3-5 minutes for a small number of list changes. Large list updates or full syncs can take considerably longer. The total time is in related part to the connection speed to your CRM system and how busy your CRM system is, along with the number of record updates that need to be made.

The following is a screen shot of the updated Email2CRM Syncing section on the Email2CRM Tab on the Marketing List. A CRM 2011 image is shown; CRM 4 would look similarly.

The screenshot shows the Microsoft Dynamics CRM interface for a Marketing List named 'sub 7'. The 'Email2CRM' tab is selected in the left-hand navigation pane. The main content area is divided into several sections:

- Email2CRM Syncing:** Contains a 'Sync' button, a 'Sync to VR' radio button set with 'Yes' selected, a 'Sync Mode' dropdown menu set to 'Full Sync', and an 'Email2CRM License' dropdown menu set to 'Convergence License'.
- Email2CRM List Info:** Contains several input fields: 'VR Id' (250178289), 'VR List Member Count' (10), 'Unsubscribed in VR' (0), 'Invalid Email Address' (2), 'Already on List in VR' (0), 'Bounced in VR' (0), and 'Other Invalid Text' (0).
- Email2CRM Subscription Management:** Contains a 'Display Name' field, an 'Allow Optins' radio button set with 'No' selected, and an 'Include In Subscription Management' radio button set with 'No' selected.

The status bar at the bottom indicates the list is 'Active'.

In order for the Sync Now functionality to work, there must be three prerequisites satisfied:

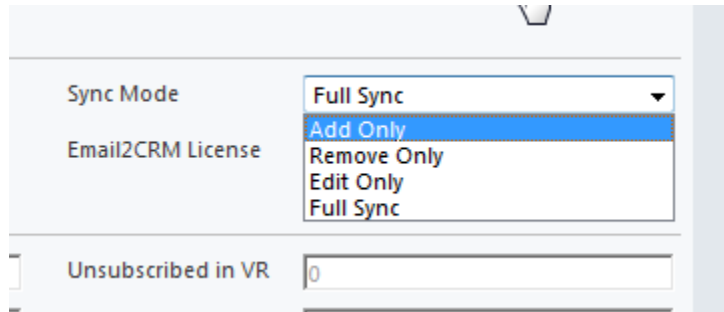
1. The Sync to VR 'Yes' radio button must be selected.
2. The Sync Mode picklist value must be selected.
3. An Email2CRM License must be selected.

There is one optional setting:

1. VR Id – if the list hasn't already been synced to VR using the background syncing process (and therefore this box is blank), then the first Manual Sync must be the Full Sync Mode picklist.

Sync Mode Options

There are four Sync Mode options:



The screenshot shows a web interface with a dropdown menu for 'Sync Mode'. The dropdown is open, showing four options: 'Full Sync', 'Add Only', 'Remove Only', and 'Edit Only'. The 'Add Only' option is currently selected and highlighted in blue. Below the dropdown, there is a text input field labeled 'Unsubscribed in VR' with the value '0' entered.

Selecting the option that matches the changes that have been made to your Marketing List can reduce the amount of time it takes to do the sync. Therefore, if you do not need to do a full sync, do not select this option, as it is the most comprehensive reconciliation and therefore will take the longest.

Full Sync: This is the most complete list synchronization process. It will check every CRM Marketing List Member and VR list member and reconcile the lists so that the members match on both lists and so that any changes made to the individual's record will be updated.

Add Only: This sync picks up records that have been added to a CRM Marketing List and adds them to the corresponding VR member list.

Remove Only: This sync identifies records that have been removed from a CRM Marketing List and removes them from the corresponding VR member list.

Edit Only: This sync looks at the field data for all the records that are on the CRM Marketing List and updates their corresponding values in the VR member list. No list members are added or removed from a list.

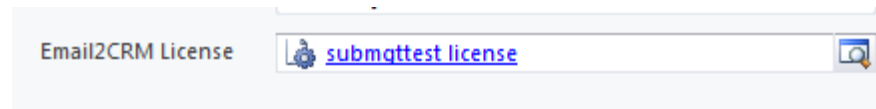
If you have made more than one type of change to your list (i.e. added some new members and removed others) then you need to select Full Sync.

Email2CRM License

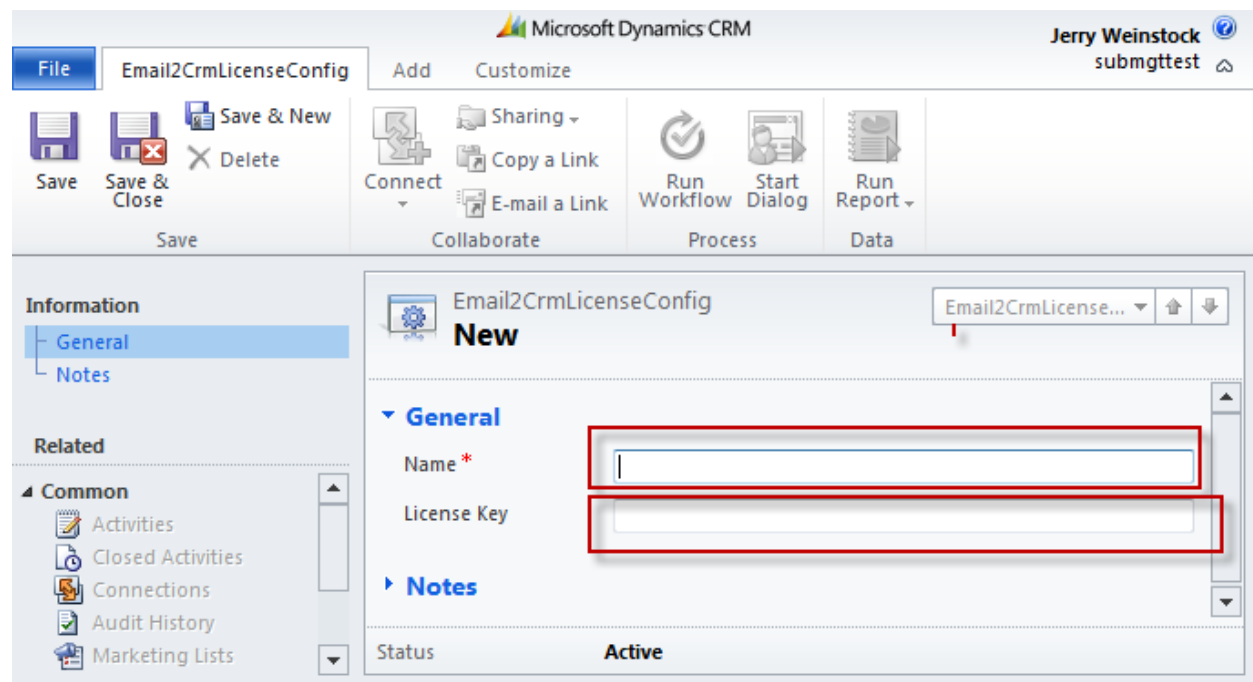
As part of the Manual Sync process, we need to include a 'key' that links the CRM system to the correct VR account. For that purpose we have created a new custom entity - Email2CRM License - and established a relationship between the Marketing List and that entity.

NOTE: This relationship does not need to be established for the automated background sync process. It is only used to support the Sync Now process.

Within the Marketing List there is a lookup control to the Email2CRM License. Most companies will only have one record in this entity, unless you have multiple VR accounts that are associated with one CRM organization.



In the Name field you can enter any meaningful description of the VR account that you are using. The license value will be issued to you when your system is configured or when you associate a new VR account with your CRM system.

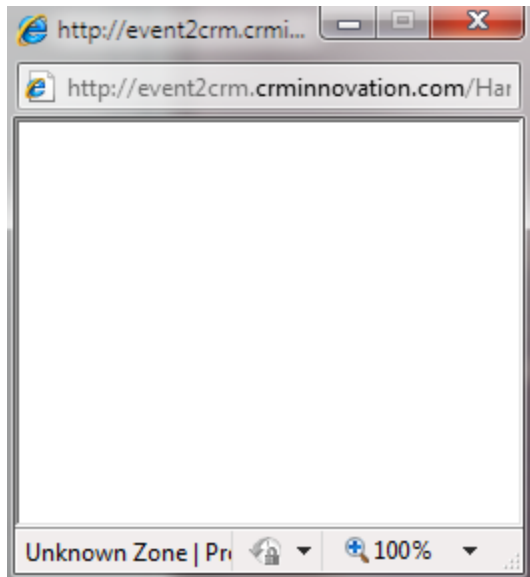


NOTE: You only need one license key record for all the Marketing Lists in your system. Just associate each list with the same key.

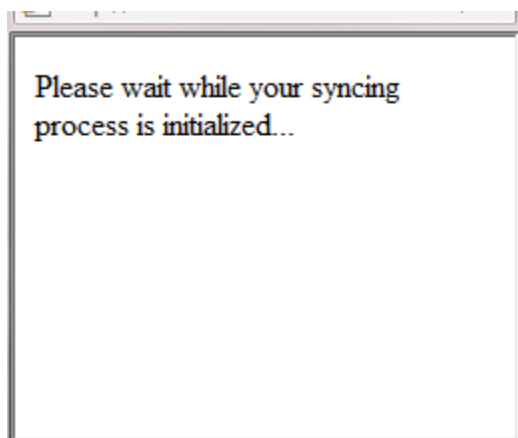
Initiating a Sync.

To initiate an on-demand sync, just select the appropriate Sync Mode from the Picklist and then click the Sync Now button.

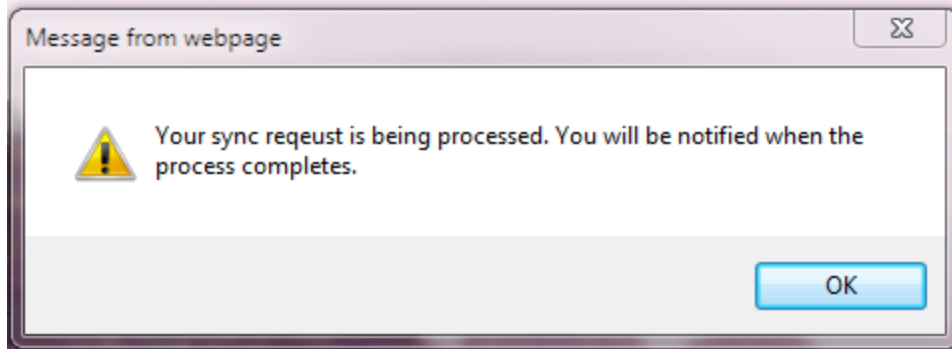
Immediately after you click the Sync button a new window will open up on your screen (it may be behind another open window). Initially that window will be blank.



After short time (about a minute or less) the window will then be updated with the following text. If you see something else (i.e. an error message) the sync process is not working, and you need to contact CRM support by phone or email.



At this point the application is attempting to connect to your CRM system. When it does it will open up another window with the following message.



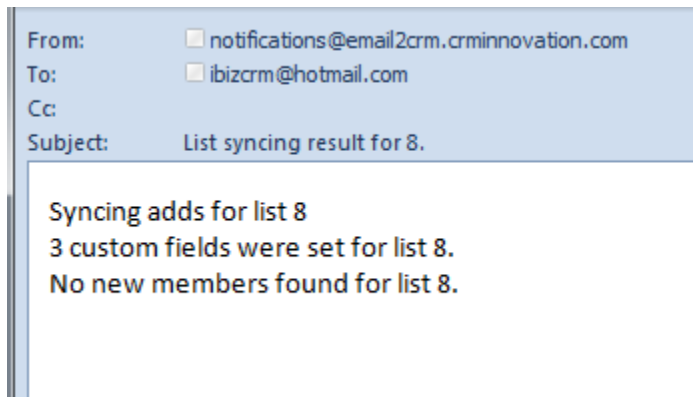
You can use the the OK button to close the dialog window.

At this point, the lists are being updated. The next notification you will receive will be an email message recapping the results of the sync process. The email goes out immediately at the completion of the sync process. It is sent from the following address, which you should add to your spam-filter-allowed list: notifications@email2crm.crminnovation.com

The email is sent to the Marketing List record owner , who may or may not be the person who initiated the sync. If you are not the list owner, then you should check with that person to confirm receipt of the completion email.

When the email is received, you may consider that the corresponding list in VR has been updated.

The following are screen shots of some examples of the email sync results you might receive.



Subject: List syncing result for sub mgmt 6.

Syncing adds for list sub mgmt 6

Adding new members for list sub mgmt 6

-1 new members were added to this list.

solutions@sli.com was rejected from this email2CrmList for an unspecified reason.

jodower@journeyteam.com was rejected from this email2CrmList for an unspecified reason.

cstrukel@manercpa.com was rejected from this email2CrmList for an unspecified reason.

csm@atcogb.com was rejected from this email2CrmList for an unspecified reason.

calbert@ddco.com was rejected from this email2CrmList for an unspecified reason.

5 total records were rejected.

Removing outdated members from list sub mgmt 6 in Vertical Response agoldberg@absoluteitsolutions.com's data successfully retrieved from Vertical Response.

agoldberg@absoluteitsolutions.com was removed from Vertical Response.

abongi@microstrat.com's data successfully retrieved from Vertical Response.

abongi@microstrat.com was removed from Vertical Response.

Syncing edits for list sub mgmt 6

ahardwick@xrmbusiness.com's data successfully retrieved from Vertical Response.

ahardwick@xrmbusiness.com's data was successfully updated in Vertical Response.

ahardwick@xrmbusiness.com was updated in Vertical Response : 4/21/2011 6:46:06 PM campa@2bsolutions.net's data successfully retrieved from Vertical Response.

campa@2bsolutions.net data was successfully updated in Vertical Response.

campa@2bsolutions.net was updated in Vertical Response : 4/21/2011 6:46:08 PM

Subject: List syncing result for Sub Mgmt4.

Syncing adds for list Sub Mgmt4

Removing outdated members from list Sub Mgmt4 in Vertical Response agoldberg@absoluteitsolutions.com's data successfully retrieved from Vertical Response.

agoldberg@absoluteitsolutions.com was removed from Vertical Response.

Syncing edits for list Sub Mgmt4

steveexample@example.com's data successfully retrieved from Vertical Response.

steveexample@example.com's data was successfully updated in Vertical Response.

steveexample@example.com was updated in Vertical Response : 4/21/2011 6:42:45 PM