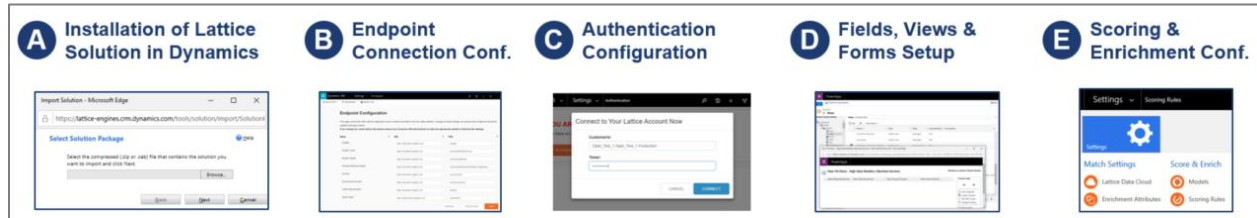


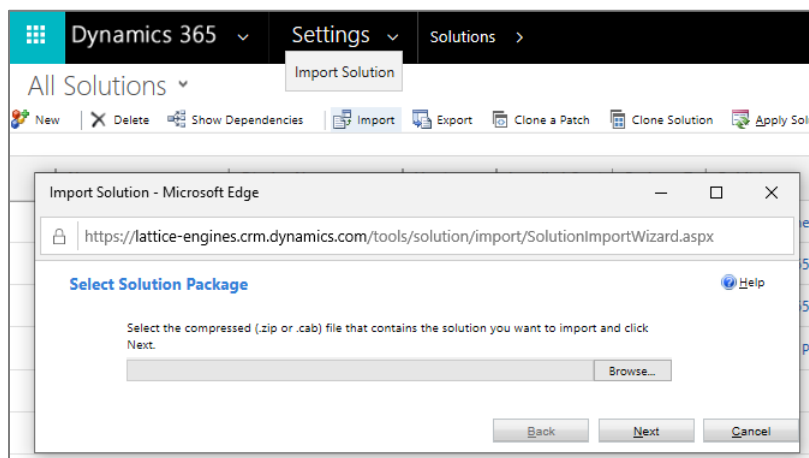
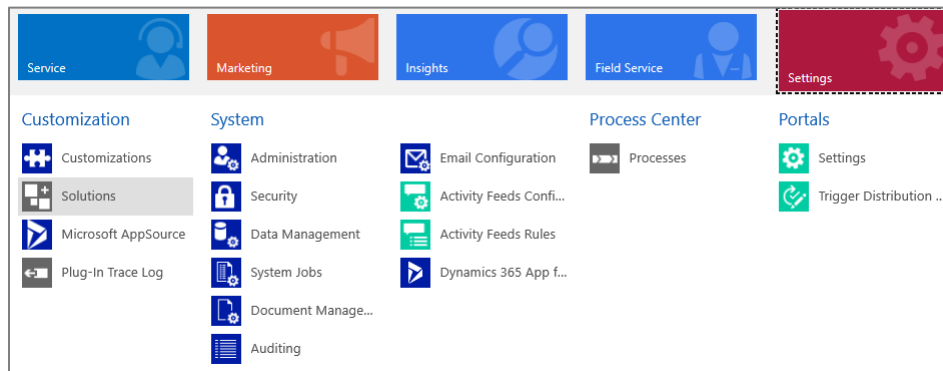
Lattice Buyer Insights for Dynamics Quick Start

This document outlines the process of setting up Lattice Buyer Insights for Dynamics (BIS365) – a solution for integration of Lattice LPI with Dynamics 365 CRM. The setup process includes five (5) stages, described below.

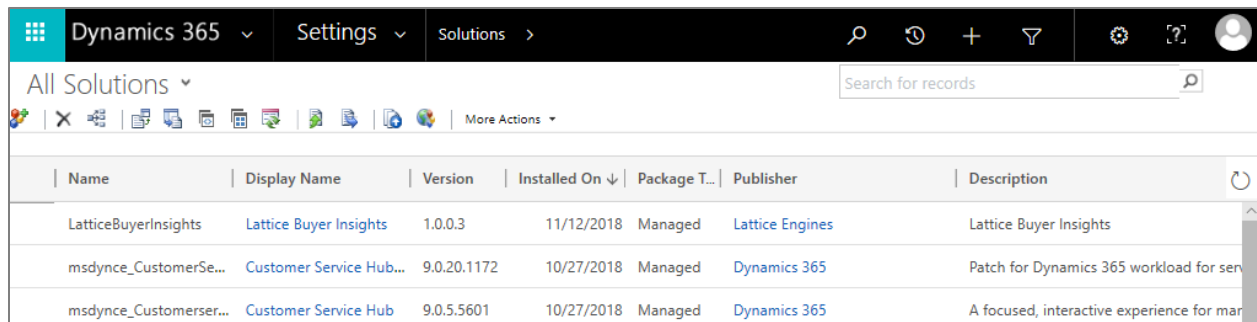


A. Installation of Solution BIS365 in Dynamics

1. Import BIS365 solution in Dynamics (for how to import solution into Dynamics, see details instructions here: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/import-update-export-solutions>)



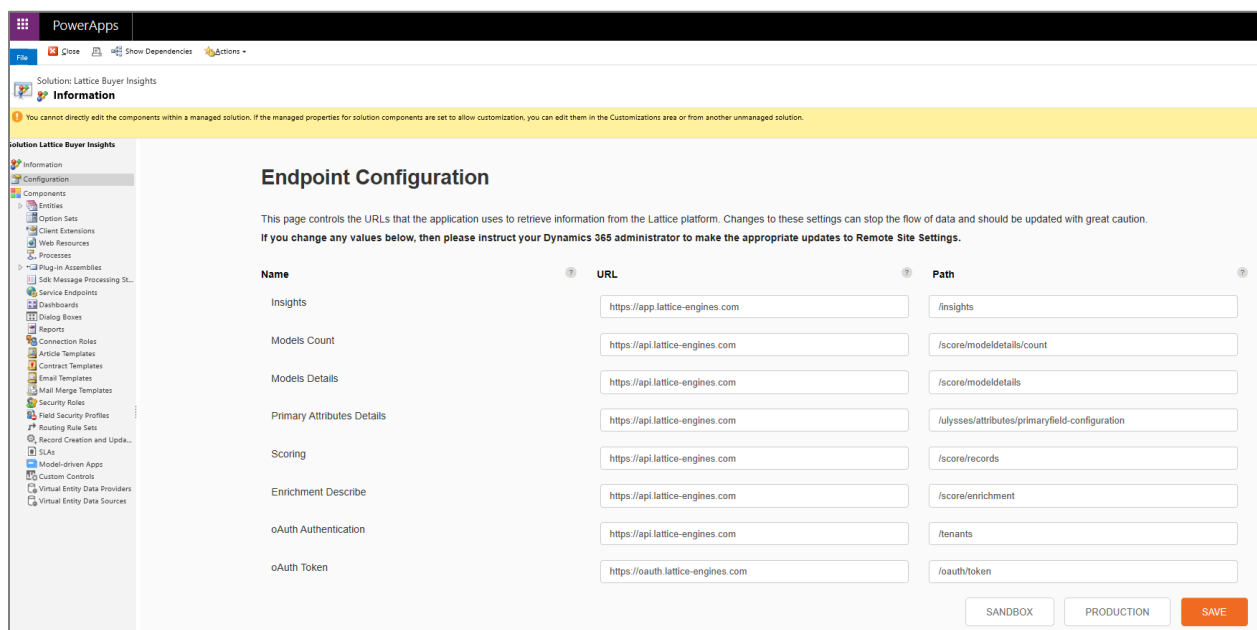
2. Once installation is complete, it should be in *All Solutions* page



Name	Display Name	Version	Installed On	Package T...	Publisher	Description
LatticeBuyerInsights	Lattice Buyer Insights	1.0.0.3	11/12/2018	Managed	Lattice Engines	Lattice Buyer Insights
msdynce_CustomerSe...	Customer Service Hub...	9.0.20.1172	10/27/2018	Managed	Dynamics 365	Patch for Dynamics 365 workload for serv...
msdynce_Customerser...	Customer Service Hub	9.0.5.5601	10/27/2018	Managed	Dynamics 365	A focused, interactive experience for mar...

B. Endpoint connection configuration

1. Click on *Lattice Buyer Insights* solution name. The Endpoint Configuration page would pop up. Configure URLs to connect to Lattice LPI.
2. Lattice also provides two shortcuts for connecting to “Sandbox” and “Production” environment.



Endpoint Configuration

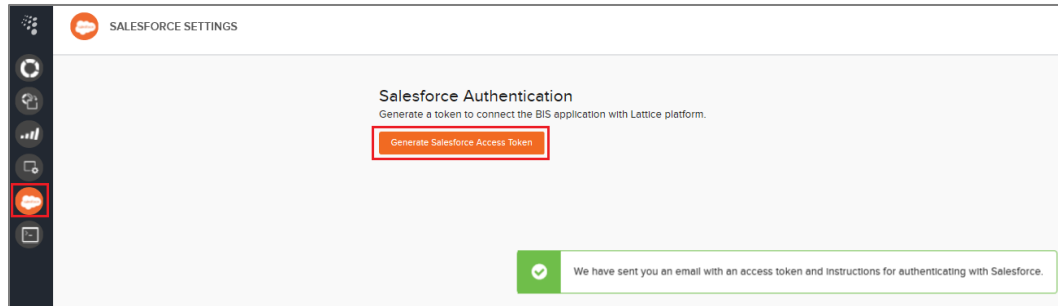
This page controls the URLs that the application uses to retrieve information from the Lattice platform. Changes to these settings can stop the flow of data and should be updated with great caution. If you change any values below, then please instruct your Dynamics 365 administrator to make the appropriate updates to Remote Site Settings.

Name	URL	Path
Insights	https://app.lattice-engines.com	/insights
Models Count	https://api.lattice-engines.com	/score/modeldetails/count
Models Details	https://api.lattice-engines.com	/score/modeldetails
Primary Attributes Details	https://api.lattice-engines.com	/ulysses/attributes/primaryfield-configuration
Scoring	https://api.lattice-engines.com	/score/records
Enrichment Describe	https://api.lattice-engines.com	/score/enrichment
oAuth Authentication	https://api.lattice-engines.com	/tenants
oAuth Token	https://oauth.lattice-engines.com	/oauth/token

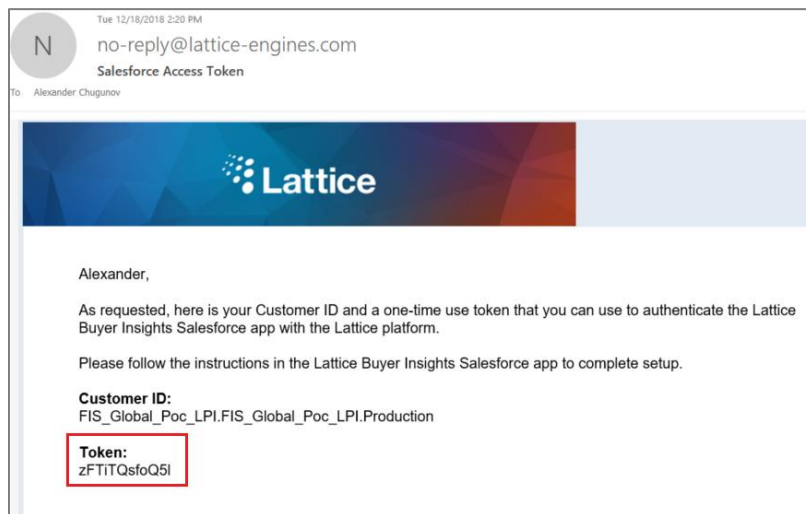
SANDBOX PRODUCTION SAVE

C. Authentication Configuration

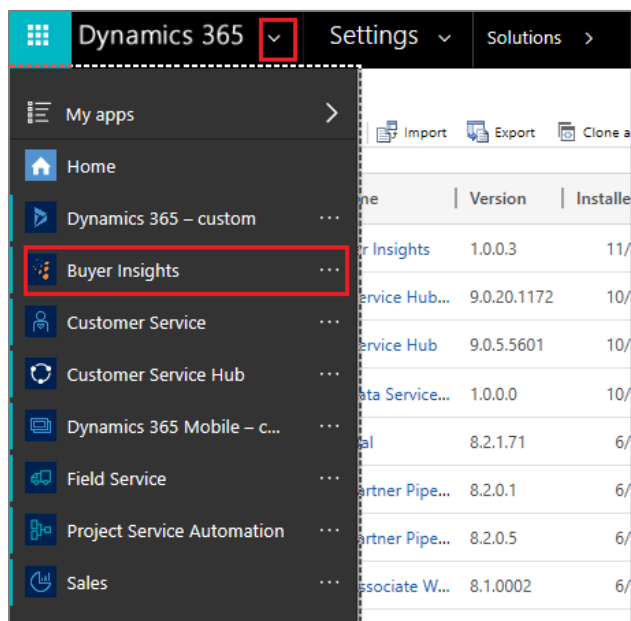
1. Go to LPI tenant and request CRM connection Token



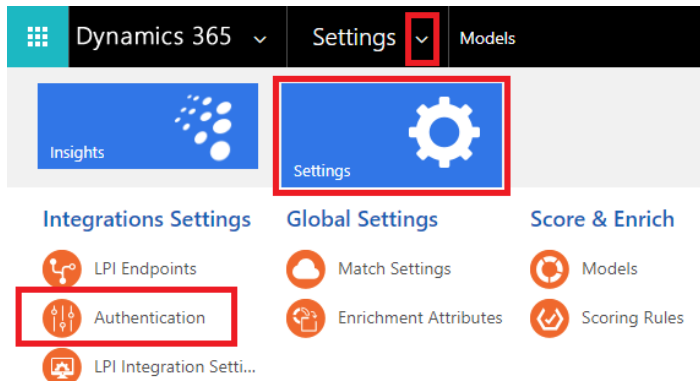
2. You will receive an email with Token



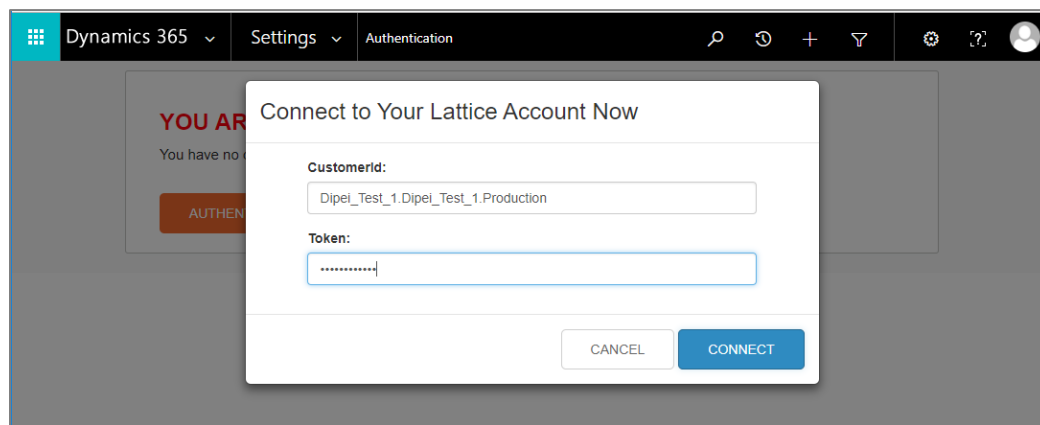
3. Navigate in Dynamics to *Lattice Buyer Insights* solution. To do this, press on drop down button in the top left corner of the screen, and select "Buyer Insights".



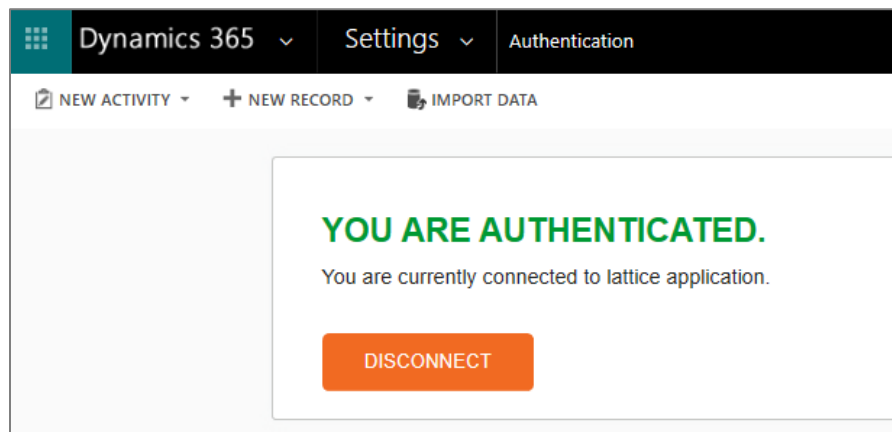
4. Once in *Buyer Insights* solution, click on the second drop down button, select *Settings*, and then *Authentication*.



5. Enter your Token to provide authentication.

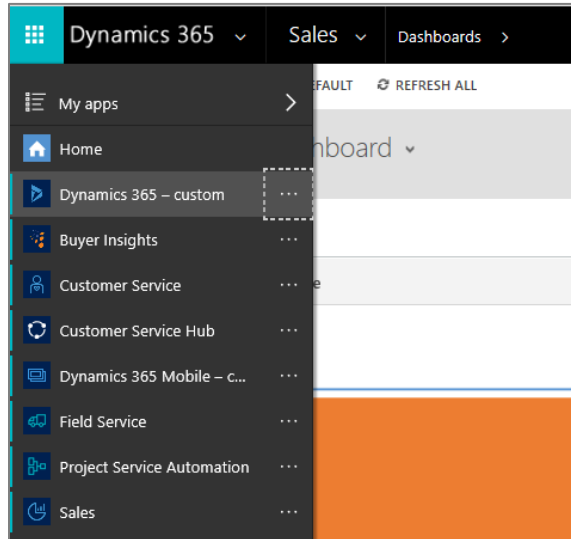


6. Your Dynamics instance should now be connected to LPI.

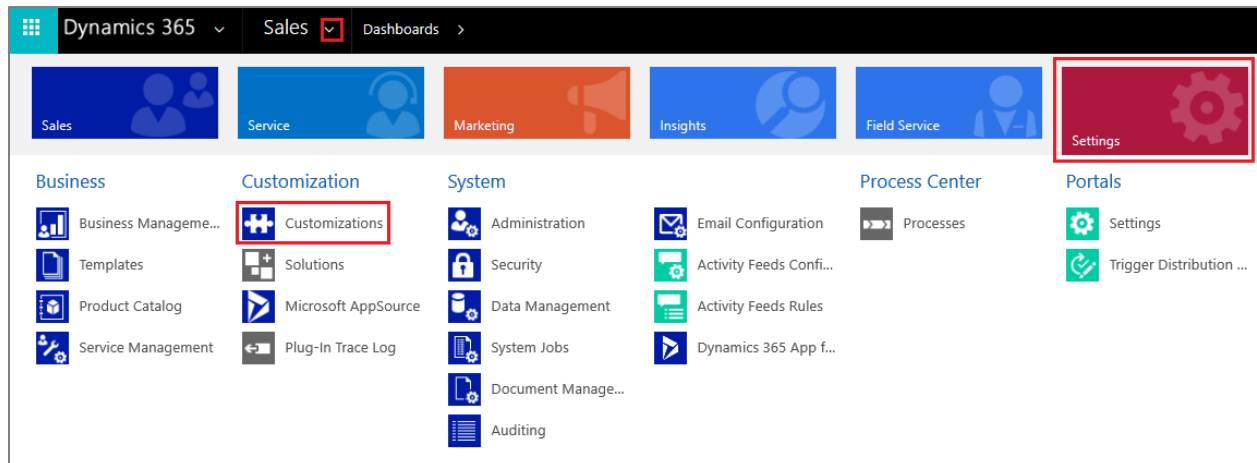


D. Fields, Views, and Forms setup

1. To provide Lattice AI scores and enrichment data in Dynamics, first you would need to create necessary fields to store this data in Dynamics.
2. From the top left drop down button, select “Dynamics 365 – Custom”



3. Click the second drop down button, select *Settings*, and then *Customizations*



4. Select *Customize the System*



5. In the left panel select and open the entity you are going to modify (account, lead, contact)

PowerApps

File Save and Close Show Dependencies Export Solution Translations Publish All Customizations Actions

Solution: Default Solution

Information

Solution Default Solution

Component Type: All

New Delete Publish Show Dependencies Managed Properties

	Display Name ↑	Name	Type	State	Customizable...	Description
			Article Template	Unmanaged	True	
			Article Template	Unmanaged	True	
			Article Template	Unmanaged	True	
			Article Template	Unmanaged	True	
			Article Template	Unmanaged	True	
			Article Template	Unmanaged	True	
			Article Template	Unmanaged	True	
			Article Template	Unmanaged	True	
			Article Template	Unmanaged	True	
			Article Template	Unmanaged	True	

6. To create fields for scoring and enrichment, click on *Fields*, and then *New*.

Account

Fields

Solution Default Solution

View: All

New Edit More Actions

	Name	Schema Name ↑	Display Name...	Type	Field Type	State	Field Security...	Audit Status	Customi
	accountcategorycode	AccountCategoryCode	Category	Option Set	Simple	Managed	Disabled	Enabled	True
	accountclassificationc...	AccountClassification...	Classification	Option Set	Simple	Managed	Disabled	Enabled	True
	accountid	AccountId	Account	Primary Key	Simple	Managed	Non Applicable	Non Applicable	True
	accountnumber	AccountNumber	Account Num...	Single Line of...	Simple	Managed	Disabled	Enabled	True
	accountratingcode	AccountRatingCode	Account Rating	Option Set	Simple	Managed	Disabled	Enabled	True
	address1_addressid	Address1_AddressId	Address 1: ID	Primary Key	Simple	Managed	Non Applicable	Non Applicable	False

7. Provide at minimum field name and data type, and press *Save*. Additional information on Field creation may be found here: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-edit-fields>

Field: New for Account - Microsoft Edge

https://lattice-engines.crm.dynamics.com/tools/systemcustomization/attributes/manageAttribute.aspx?appSolutionId=%7bFD140AAF-4DF4-11DD-BD17-0019B9

PowerApps

File Save and Close Help

Field
New for Account

Working on solution: Default Solution

Common
Information
Business Rules

General

Schema

Display Name * Lattice_Score Field Requirement * Optional

Name * new_ Searchable Yes

Field Security ☐ Enable ☒ Disable

Enabling field security? [What you need to know](#)

Auditing * ☒ Enable ☐ Disable

This field will not be audited until you enable auditing on the entity.

Description

Appears in global filter in interactive experience ☐ Sortable in interactive experience dashboard ☐

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)

Type

Data Type * Single Line of Text

Field Type * Simple

Format * Text

Maximum Length * 100

IME Mode * auto

8. Repeat field creation process for all necessary fields. Created fields might include:
 - a. Fields for matching and enrichment data
 - b. For accounts or/and leads: Lattice Score, Lattice Rating, Score date.
 - c. Note that you might need to create separate fields for each scoring model if you are going to use multiple models to score the same accounts or leads
9. Create **views** (lists of accounts/leads/contacts). You might also use existing view as a template by using "Save as..." functionality. Additional information on view creation may be found here: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-edit-views>

Account
Views

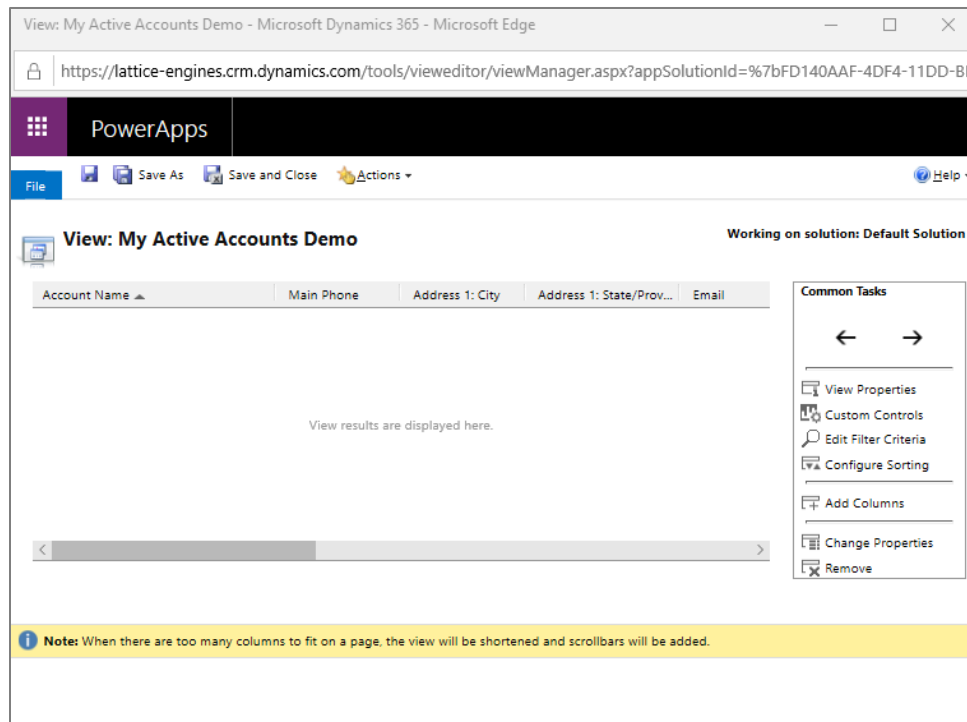
Solution Default Solution

Information
Components
Entities
Account
Forms
Views
Charts
Fields
Keys
1:N Relationships
N:1 Relationships
N:N Relationships
Messages
Business Rules
Hierarchy Settin...
Dashboards

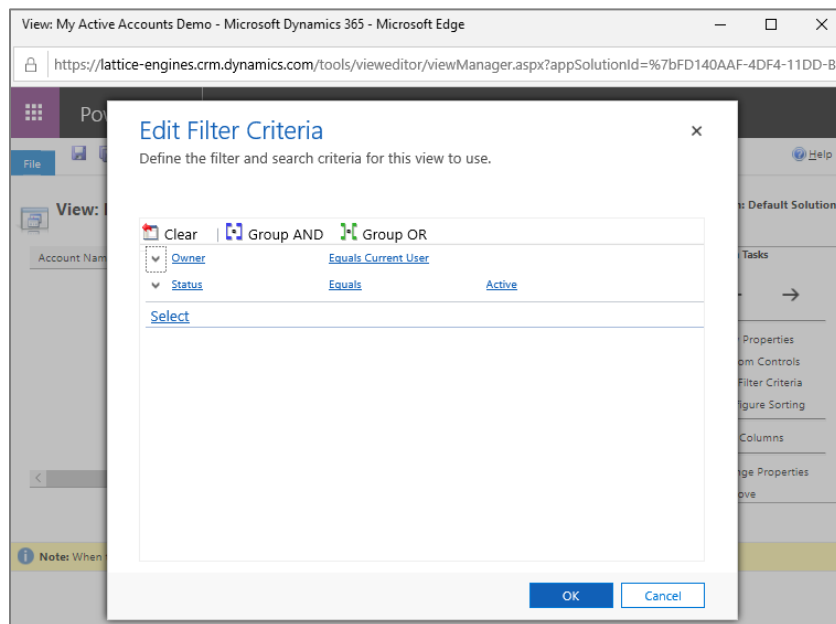
View: All Active Views

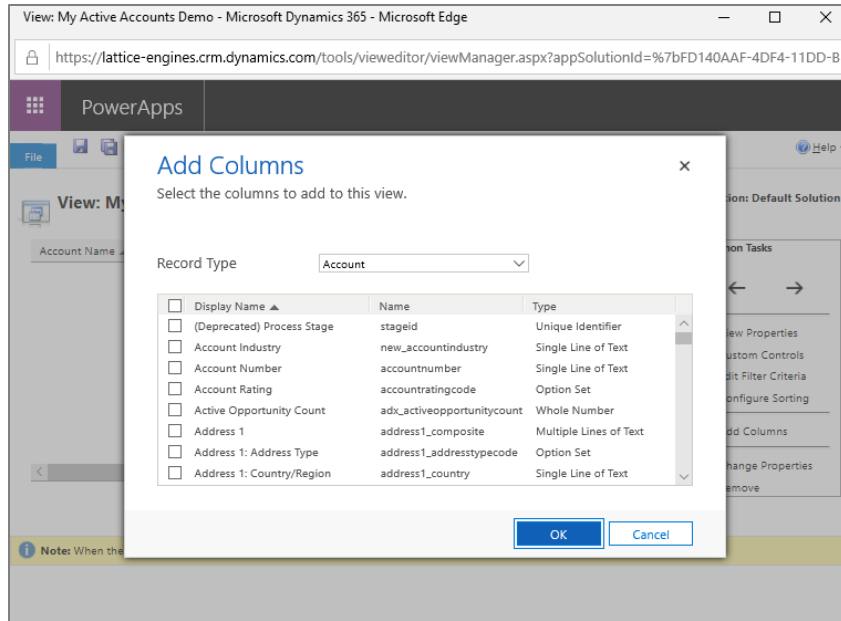
☒ New ☐ More Actions

Name	Type	State	Customizable...	Description
Account Advanced Find View	Advanced Find View	Managed	True	
Account Associated View	Associated View	Managed	True	Displays information about related accounts in the detail form of ...
Account BulkOperation View	Associated View	Managed	True	Display Accounts for BulkOperation View
Account List Member View	Associated View	Managed	True	Displays information about related accounts in the Members subg...
Account Lookup View	Lookup View	Managed	True	
Accounts Being Followed	Public View	Unmanaged	True	Accounts being followed.



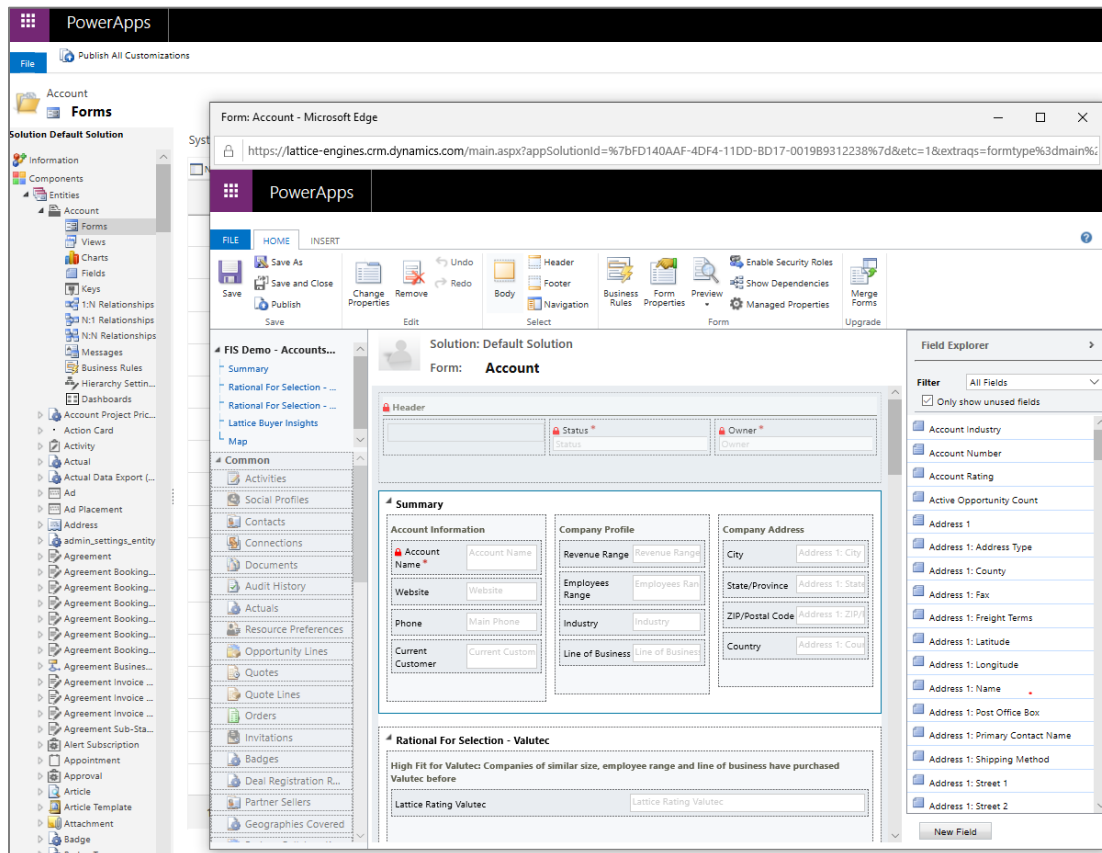
- Repeat process of creating views depending on business needs, e.g. separate views for products, sales plays, sales rep category, etc. Views will be used to filter accounts for a sales rep ("*Edit Filter Criteria*") and provide sales reps with relevant data ("*Add Columns*")



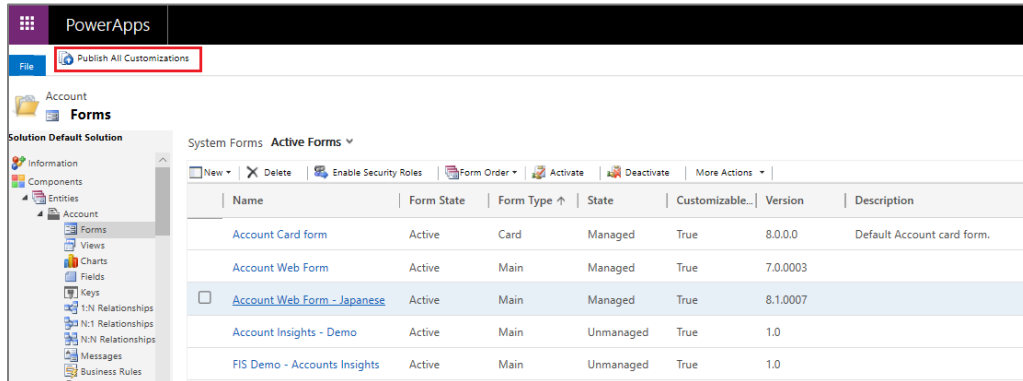


11. Create **forms** (detailed representation of an account/lead/contact).

- Add necessary fields to a form (e.g. AI rating, enrichment data and data to matching to LDC) and customize the format.
- You might create different forms for different products/plays which would include specific enrichment fields

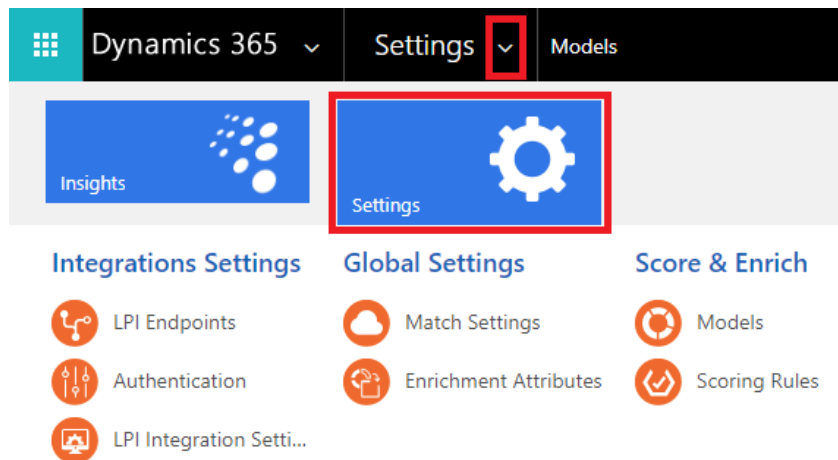


12. Please note: out of the box, Dynamics supports setting up default form only by user, and opens most recently used form. E.g. if a sales rep in browsing a view and forms for Product A, and then switches to a view for Product B and clicks on one of the accounts, Dynamics will open a form for Product A. Sales rep would need to manually switch to a form for Product B. However, you can automate this by using JavaScript.
13. Once you have created or modified views and forms, you need to publish your customizations to your Dynamics instance to make them available.



E. Scoring and Enrichment Configuration

1. To configure matching to LDC, enrichment and modelling, navigate to *Buyer Insights* solution in Dynamics, click on the second drop down button and select *Settings*.



2. The *Match Settings* page configures matching of accounts/contacts/lead to LDC records. Provide a mapping of LDC attributes to Dynamics fields or leave them blank if Dynamics does not have a corresponding attribute. When an account would be entered in Dynamics, Lattice would automatically match it with LDC using these fields.

Match Attributes

These settings will be used by default whenever a Lattice Data Cloud Match is made, for example when generating insights or scores.

Lead

Contact

Account

Opportunity ⚠

Map fields below to match records with Lattice Data Cloud. Mapping as many as possible will allow for a better match.
We strongly recommend mapping the Company Name field for improved scoring accuracy.

Attribute	Dynamics 365 Field
City (STRING)	City (String)
CompanyName (STRING)	Company Name (String)
Country (STRING)	Country/Region (String)
DUNS (STRING)	-- Select --
Email (STRING)	Email (String)
Id (STRING)	Lead (UniqueIdentifier)
PhoneNumber (STRING)	Business Phone (String)
PostalCode (STRING)	ZIP/Postal Code (String)
State (STRING)	State/Province (String)
Website (STRING)	Website (String)

SAVE

3. In the *Enrichment Attributes* page you can configure matching of enrichment fields which you would want to use to augment Dynamics records with. Provide a mapping of LDC attributes to Dynamics fields or leave them blank if Dynamics does not have a corresponding attribute.

Lead

Contact ⚠

Account

You can enrich leads, contacts and accounts with data attributes from the Lattice Data Cloud. To enable enrichment, select which fields in Dynamics 365 each attribute should be written to. After setting this up, you need to create a rule.
For each attribute available from the Lattice Data Cloud, select a Dynamics 365 field to write the attribute to.
This will overwrite any existing data in the attribute you select.

Enrichment Attribute	Dynamics 365 Field
Add To Cart (Integer)	Website: Add to Cart (Integer)
Adwords Cost (Integer)	-- Select --
Adwords Keywords Count (Integer)	-- Select --
Adwords Traffic (Integer)	-- Select --
Bag (Integer)	-- Select --
Brand Loyalty (String)	Intent: Brand Loyalty (String)

4. In the *Models* page you see scoring models available in your LPI tenant. Click on individual model to configure how it would be used in Dynamics.

Models				
Number	Model Name	Type	Enabled Objects	Created Date
1	Prepaid Product Model - All Industries (w+o)	Account		2018-10-31T19:49:13Z
2	Prepaid Product Model - Finance Industry (w+o)	Account		2018-10-31T20:05:32Z
3	Valutec Product Model - All Industries	Account		2018-10-31T20:34:55Z
4	Merchants Services Model - All Industries	Account	Account	2018-10-31T21:58:14Z
5	Merchant Services Model - Retail	Account		2018-10-31T22:47:12Z
6	Valutec Model - Restaurants and Retail	Account	Account	2018-11-01T00:19:21Z

REFRESH MODELS

5. For each model you plan to use in Dynamics, set up the following:
 - a. Fields for mapping to LDC (by default you use settings from *Lattice Data Cloud* page).
 - b. Export fields: additional fields for modelling
 - c. Scoring Configuration: where LPI would write results of the scoring

← All Models

Model: Prepaid Product Model - All Industries (w+o)
To enable scoring, please configure field mapping for one or more objects.

Type
ACCOUNT

Account

☒ Use Lattice Data Cloud Settings for current entity?

Export Fields
Make sure all fields are mapped correctly.

Attribute	Dynamics 365 Field
Industry (STRING)	-- Select --

Scoring Configuration
Select the fields that you want to write data back to in Dynamics 365.

Scoring Value	Dynamics 365 Field
Lattice Score (Integer)	Lattice Score (Integer)
Lattice Rating (String)	Lattice Rating (String)
Last Lattice Scored Date (DateTime)	Lattice Score Last Updated (DateTime)

SAVE

6. *Scoring Rules* page allows you to create rules for scoring of accounts/leads in Dynamics. Create a new rule for each model you are planning to use.

Scoring Rules						
The rules below control when a lead, account or contact is scored. Each rule is associated to a model and defines which records should be included.						
Rule Name	LPI Model	Action	Entity	Criteria	Trigger	Active
Score New or Edited Accounts	Valutec Model - Restaurants and Retail	Score & Enrich	account	Active Accounts	Create & Update	
Score Valutec	Valutec Model - Restaurants and Retail	Score & Enrich	account	My Active Accounts	Create & Update	
Score Merchant Services	Merchants Services Model - All Industries	Score & Enrich	account	My Active Accounts Demo	Create & Update	

Create Rule

7. For each *Scoring Rule* provide the following:
 - a. Rule Name
 - b. Lattice Model: select a model to be used for scoring
 - c. Entity: Account for account model, Lead or Contact for contact model
 - d. Action: can be one of the following: Score, Enrich Only, Score & Enrich
 - e. Active: the rule will be active or in-active

- f. Criteria: a view of the selected entity. Only the records in this Dynamics view will be scored/enriched if the events is invoked under this new create rule.

Edit: Score New or Edited Accounts
A scoring rule controls when a lead, account or contact is triggered for scoring, which model will be used for scoring and optionally applies a filter on which records will be scored.

Rule Settings
Rule Name
Lattice Model
Entity
Action
Trigger
Active
Criteria

Score New or Edited Accounts

Valuelec Model - Restaurants and Retail

Account

Score & Enrich

Create & Update

☐

Active Accounts

Delete

CloneCancelSave