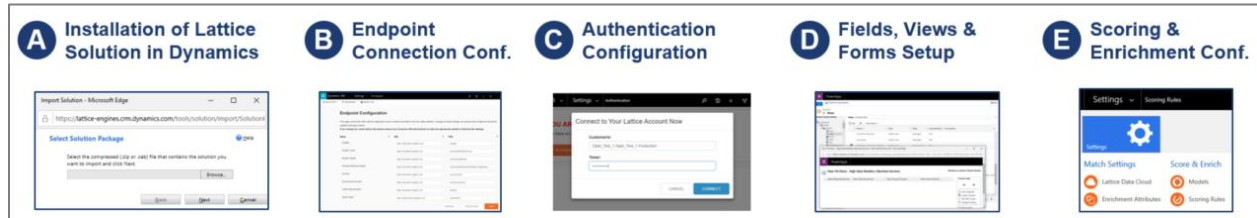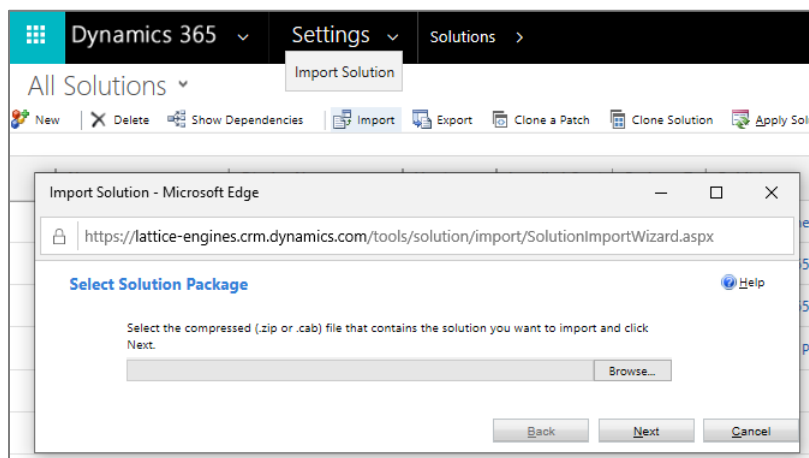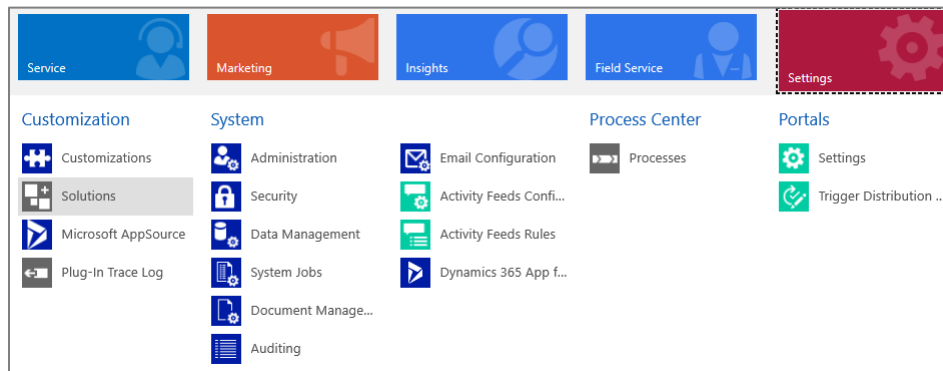# Lattice Buyer Insights for Dynamics Quick Start

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.
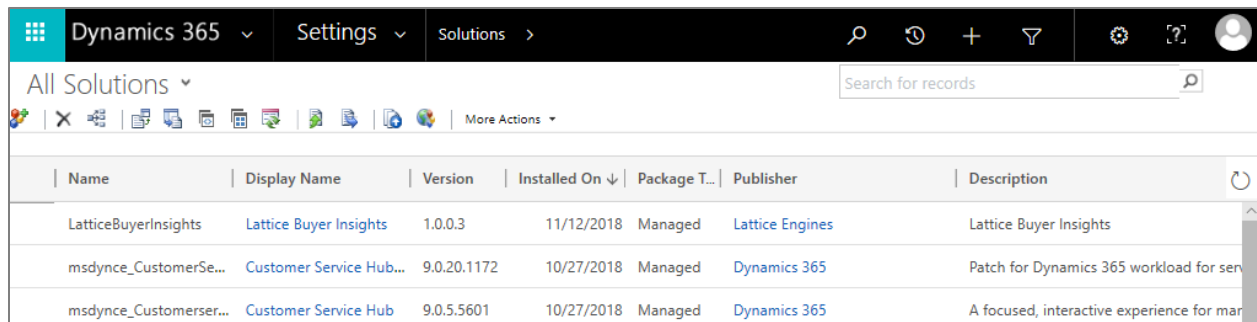

A. Installation of Solution BIS365 in Dynamics

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)
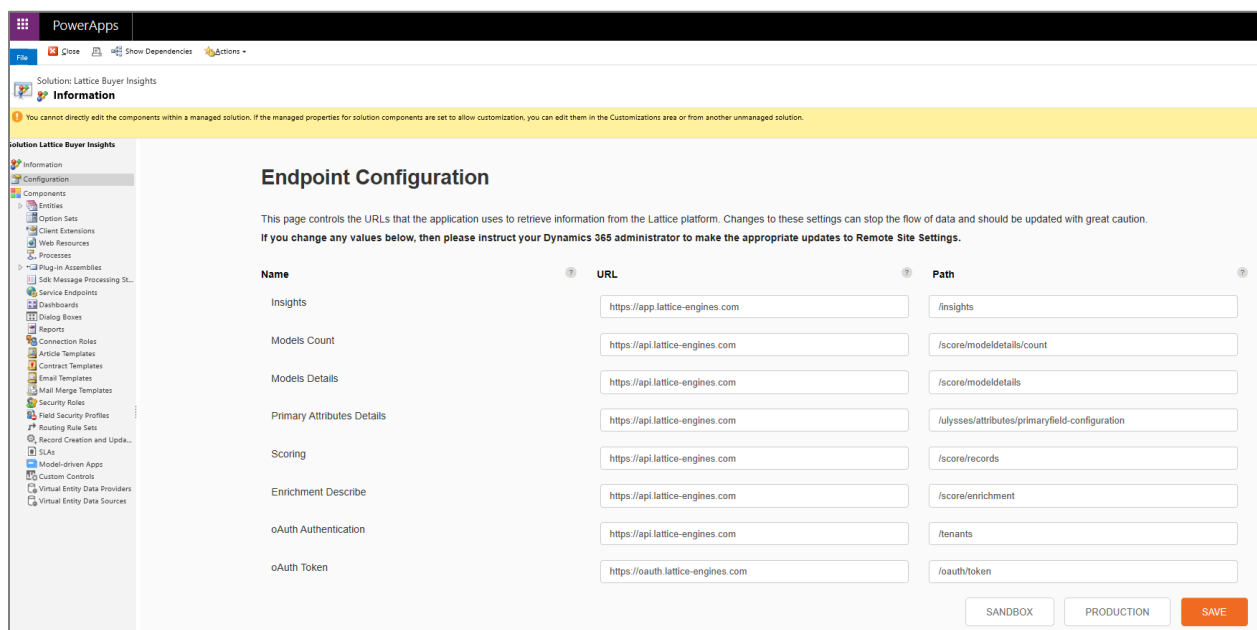

2. Once installation is complete, it should be in *All Solutions* page

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.

C. Authentication Configuration

1. Go to LPI tenant and request CRM connection Token
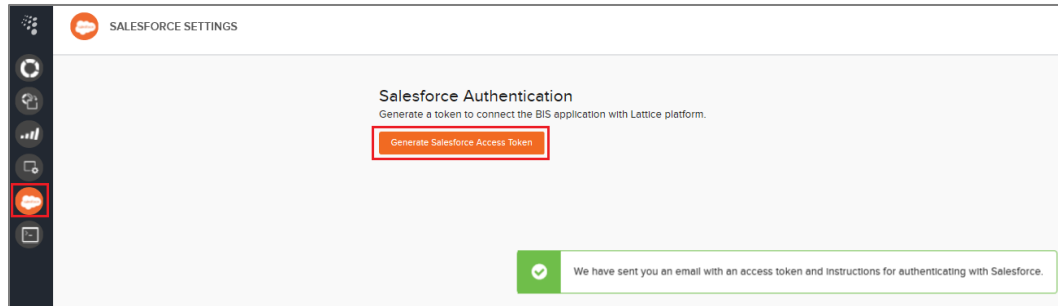
2. You will receive an email with Token
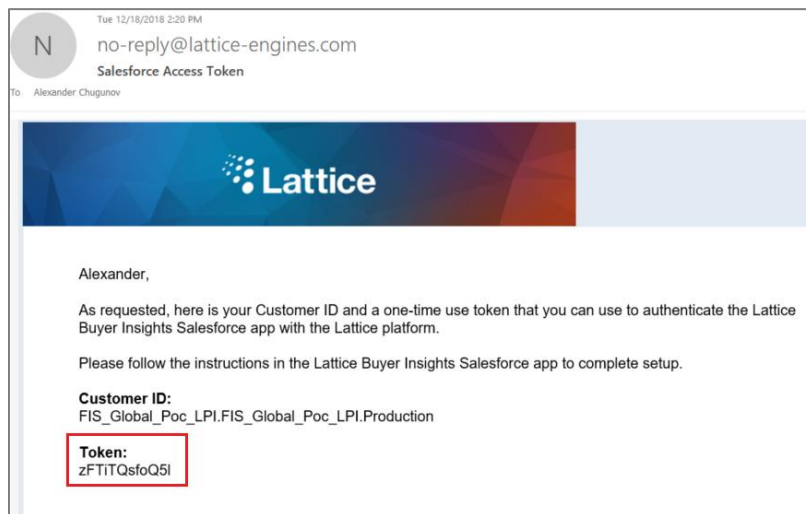
3. Navigate in Dynamics to *Lattice Buyer Insights* solution. To do this, press on drop down button in the top left corner of the screen, and select "Buyer Insights".
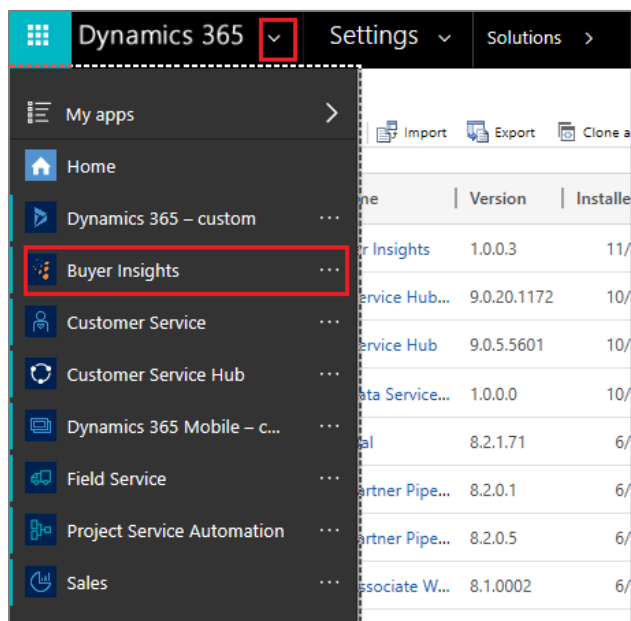
4. Once in *Buyer Insights* solution, click on the second drop down button, select *Settings,* and then *Authentication.*
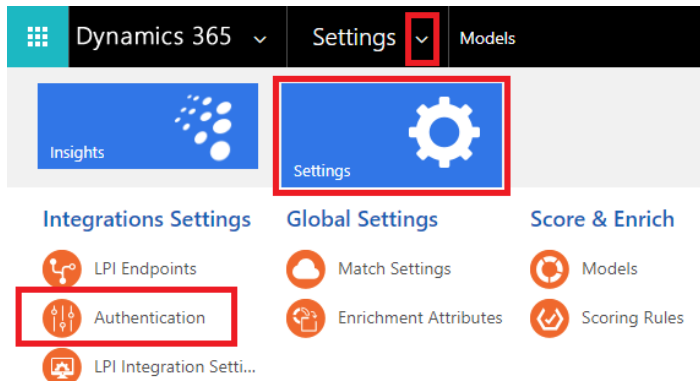
5. Enter your Token to provide authentication*.*
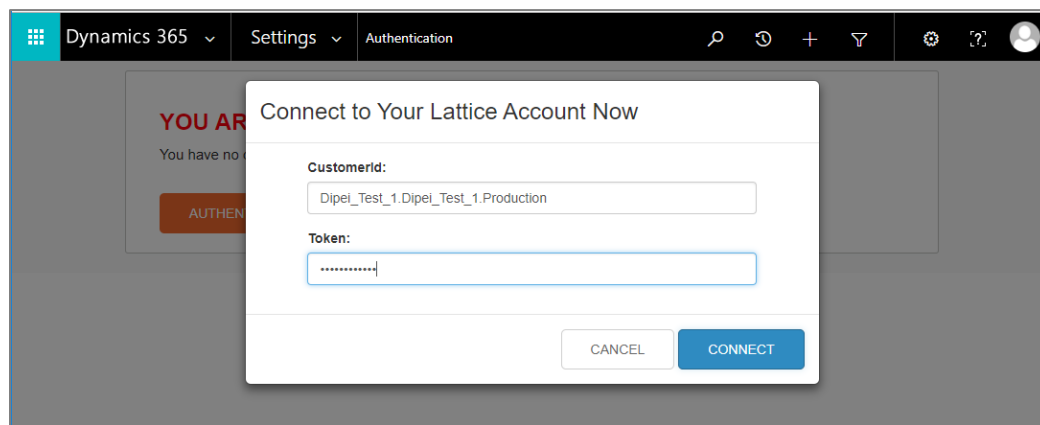
6. Your Dynamics instance should now be connected to LPI*.*
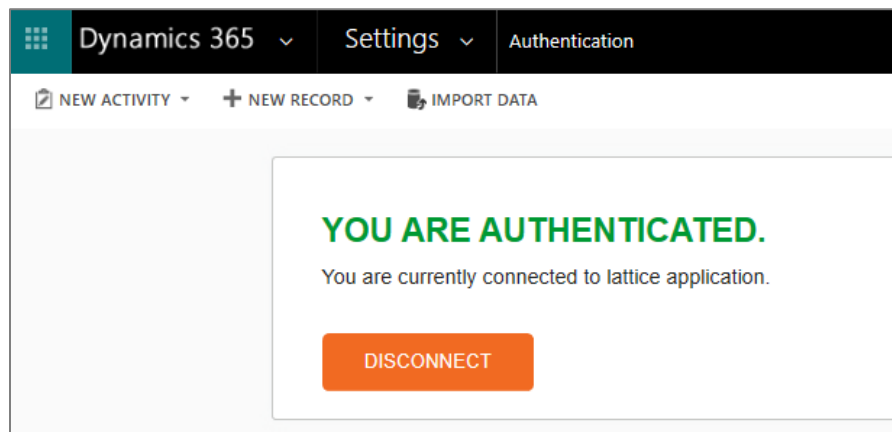
D. Fields, Views, and Forms setup

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"
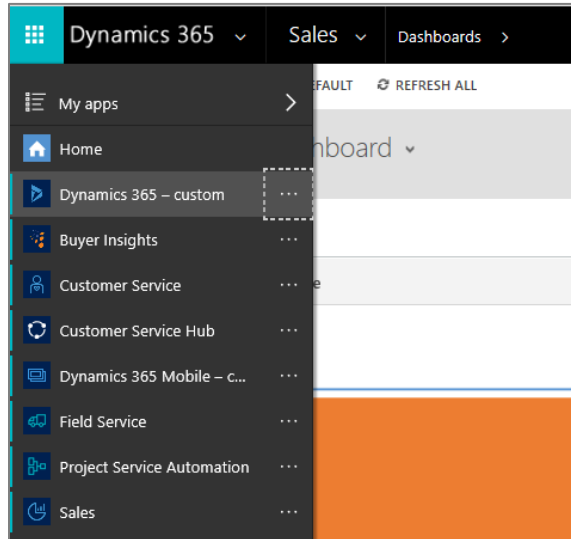
3. Click the second drop down button, select *Settings*, and then *Customizations*
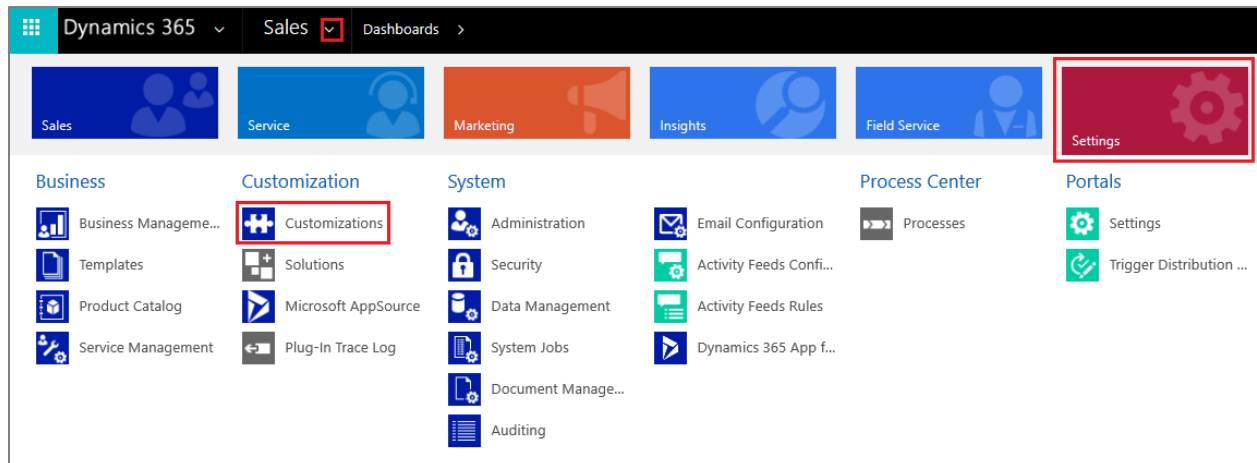
4. Select *Customize the System*

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

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

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

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

10. 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*")
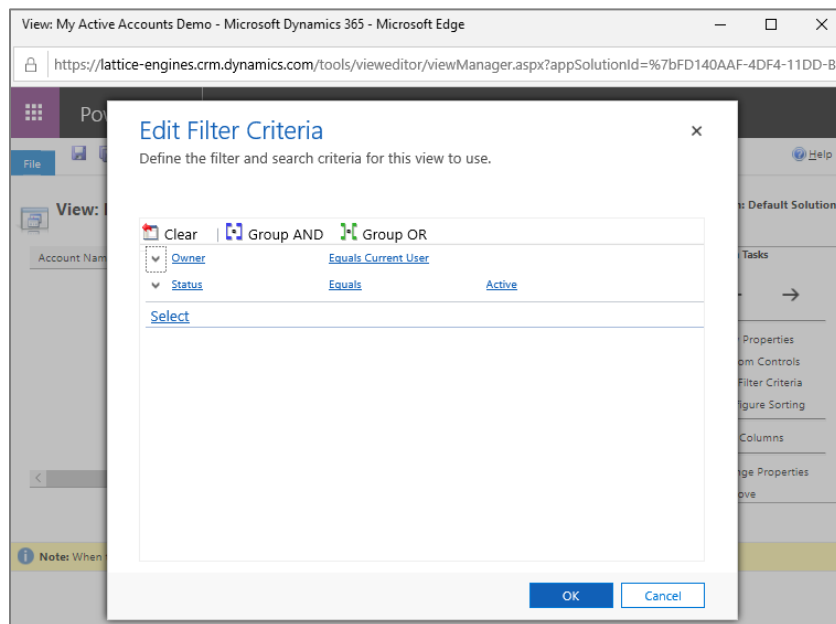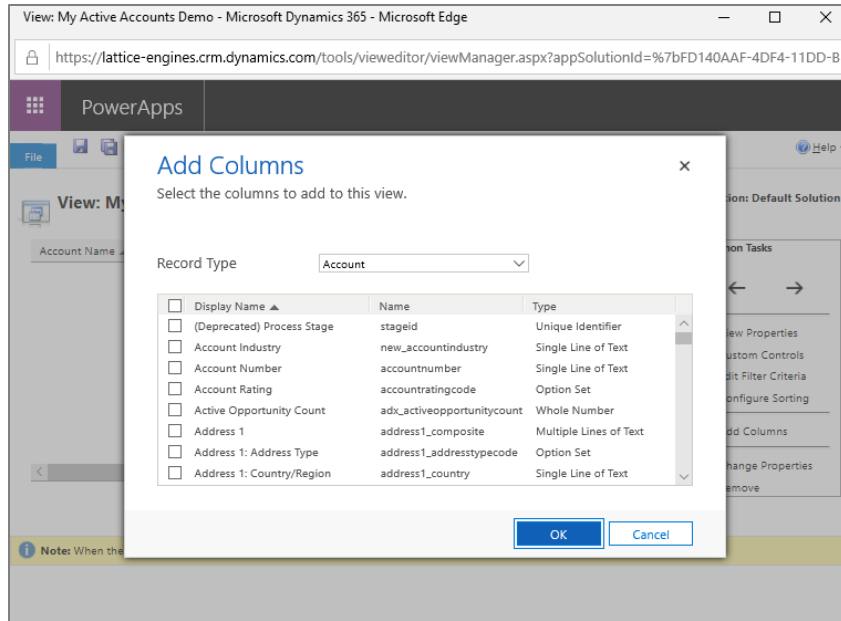
11. Create **forms** (detailed representation of an account/lead/contact).
    a. Add necessary fields to a form (e.g. AI rating, enrichment data and data to matching to LDC) and customize the format.
    b. You might create different forms for different products/plays which would include specific enrichment fields
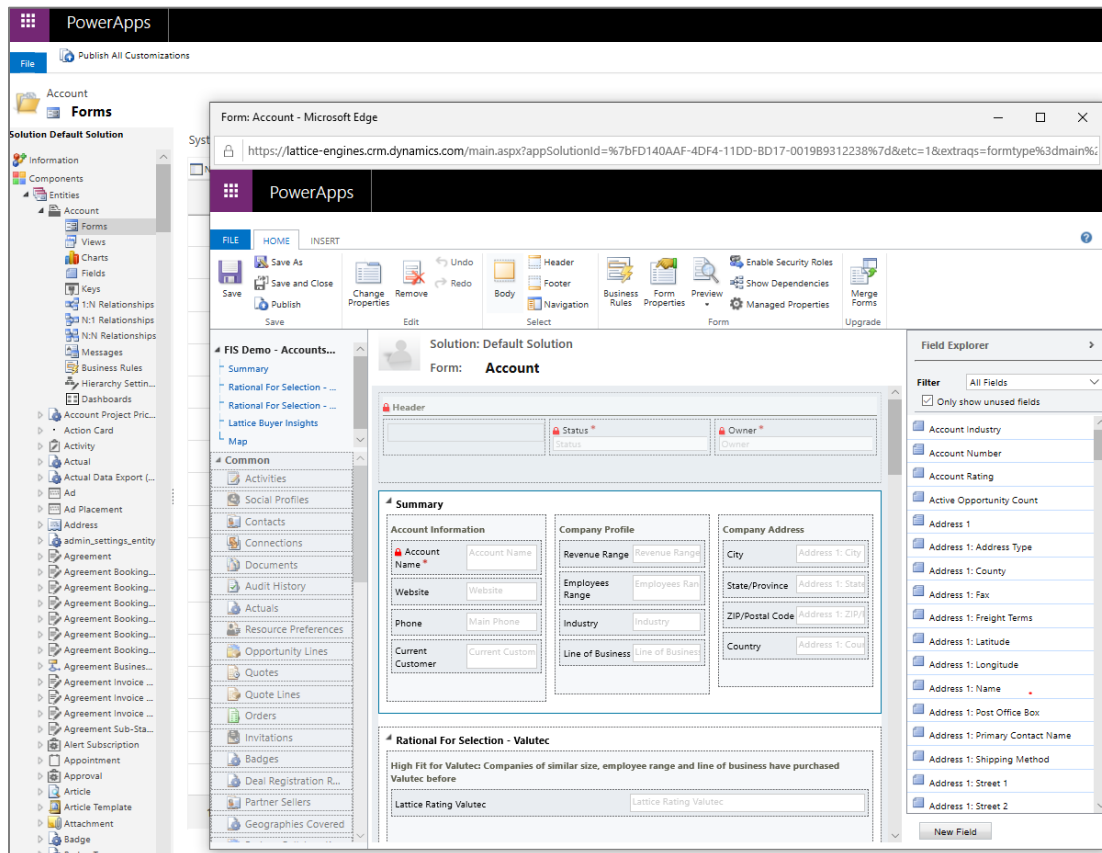
12. Please note: out of the box, Dynamics supports setting up default form only by user, and opens most recently used form. E.g. if a sales rep in browsing a view and forms for Product A, and then switches to a view for Product B and clicks on one of the accounts, Dynamics will open a form for Product 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.
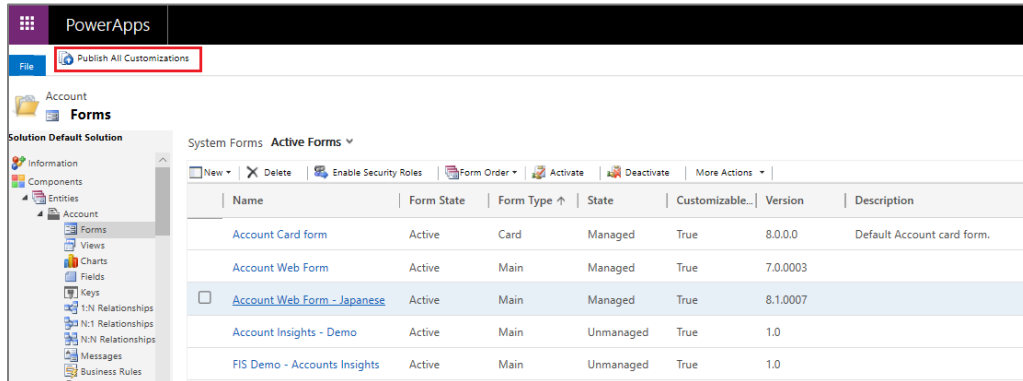
E. Scoring and Enrichment Configuration

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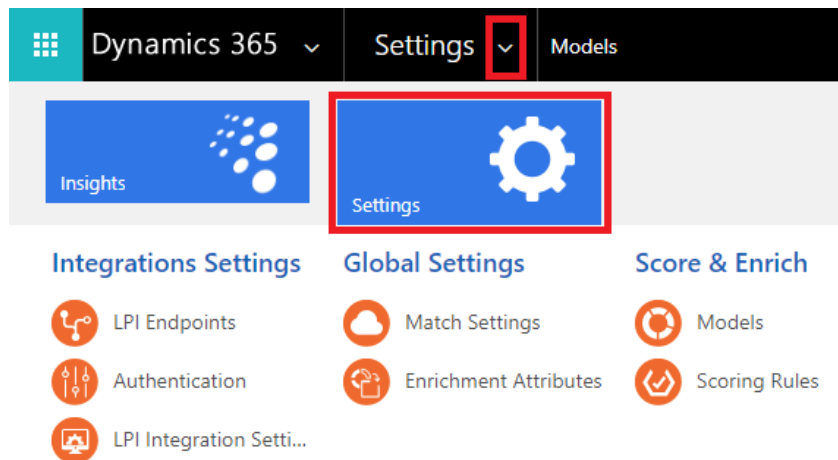
2. The *Match Settings* page configures matching of accounts/contacts/lead to LDC records. Provide a mapping of LDC attributes to Dynamics fields or leave them blank if Dynamics does not have a corresponding attribute. When an account would be entered in Dynamics, Lattice would automatically match it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

Enrichment Attributes

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.

| Lead | Contact ⚠ | Account |

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	N
Score Valutec	Valutec Model - Restaurants and Retail	Score & Enrich	account	My Active Accounts	Create & Update	N
Score Merchant Services	Merchants Services Model - All Industries	Score & Enrich	account	My Active Accounts Demo	Create & Update	N

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	Score New or Edited Accounts
Lattice Model	Valutec Model - Restaurants and Retail
Entity	Account
Action	Score & Enrich
Trigger	Create & Update
Active	
Criteria	Active Accounts

Delete   Clone   Cancel   Save