Event2CRM – Installation & Setup Guide

For Microsoft Dynamics 365 & CRM 2016, 2015, 2013

Plan. Promote. Track.

Any event that requires registration or ticketing.

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CONTENTS

INSTALLATION

**INSTALLING Event2CRM SOLUTION**

What you will need to do:

(On Premise or Partner Hosted, have your CRM partner or IT department do the following steps immediately before the setup session)

      1. Backup the CRM Org Database using SQL Server Management Studio.

      2. Export the current CRM Default Solution as backup solution.

If you are using CRM Online just do Step #2 above.

Event2CRM installs like any other MS Dynamics CRM managed solution. Login with a CRM system administrator user account and in MS Dynamics CRM go to **Settings | Solutions** and click on the **Import** button.
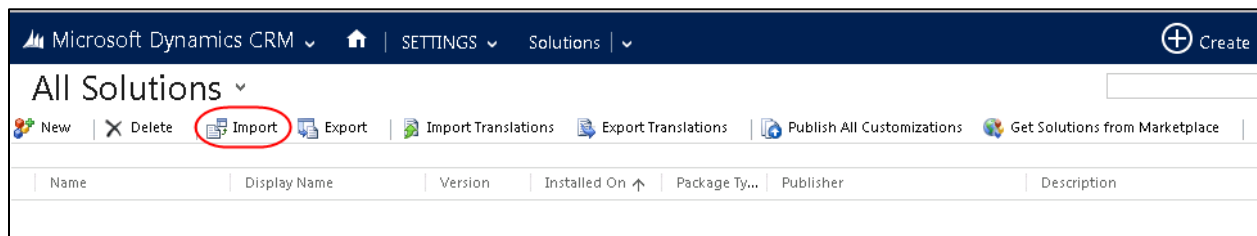
In Select Solution Package dialog, click on the **Choose File** button and select the Event2CRM solution zip file (*Event2CRM_8_2_0_X_managed .zip*) and click on the **Next** button. In the Solution Information dialog click on **Next** button.
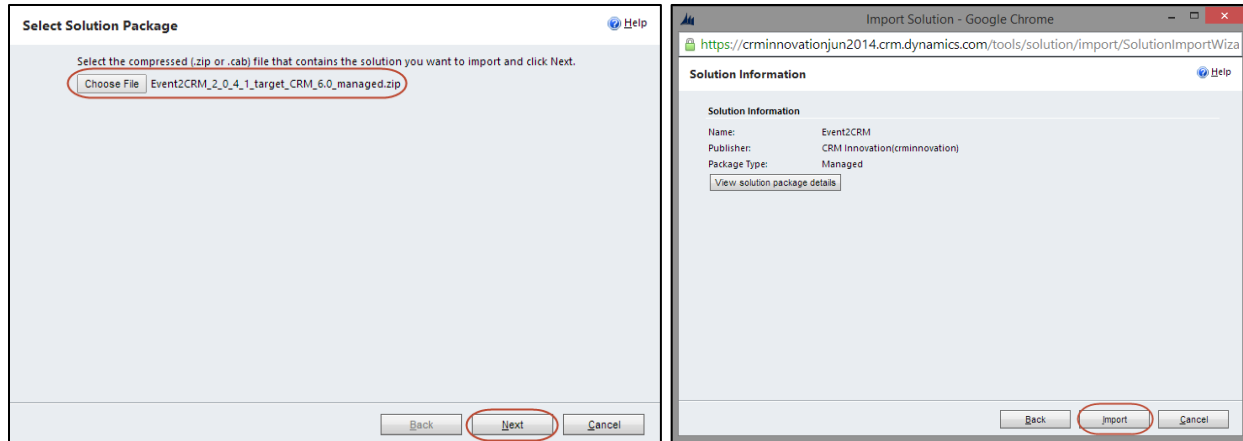
After the Solution has been successfully imported, the following screen is displayed. At this point, click on **Close**.
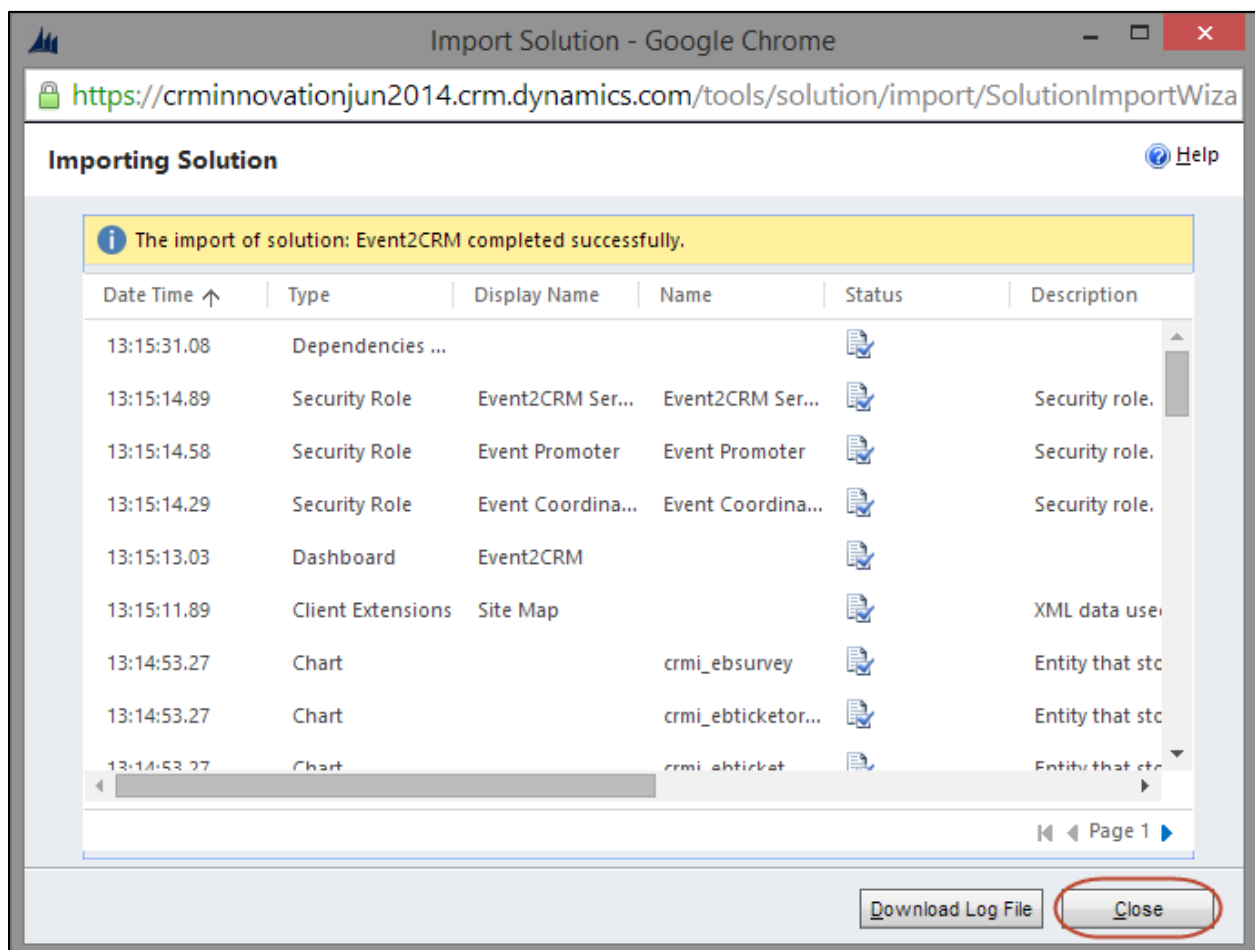
SITEMAP SETUP

In MS Dynamics CRM navigate to **Settings | Customizations** in the CRM system. Open the Default Solution window by clicking **Customize the System**.

For each of the Event2CRM solution entities (Events, Event Order, Event Registrant, Event Registration Answer, Event Ticket, Event Venue, Event2CRM Configuration) use the **"Areas that display this entity"** section to decide where each of the Event2CRM entities will appear in you CRM Sitemap by checking the desired area(s) and clicking the save button:

*(NOTE: Out of the box the Event2CRM entities will be set to display in the **Settings** area of your CRM.)*

When done return to the main Entities section of the Default solution and click on the **Publish All Customizations** button.
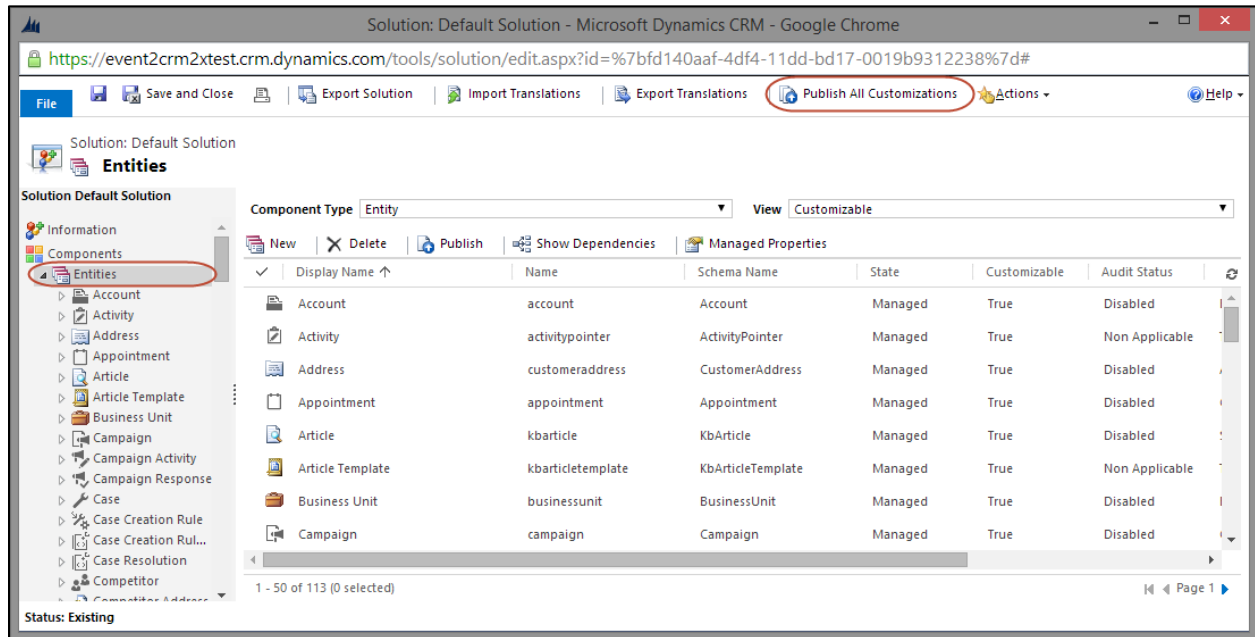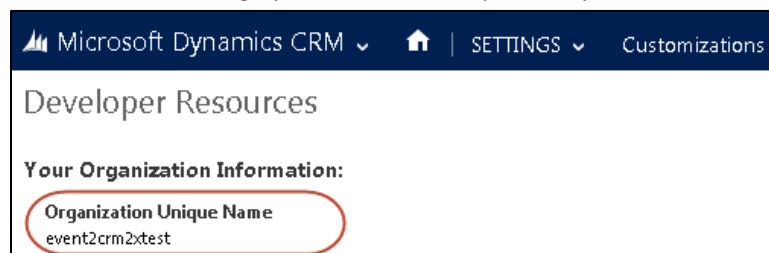

Press **F5** key or click on the browser **Refresh** button to refresh the CRM sitemap.

REGISTRATION

PRE REGISTRATION

What you will need:

1. CRM Credentials
   a. MS Dynamics CRM Username
   b. MS Dynamics CRM Password
   c. MS Dynamics CRM URL
   d. MS Dynamics CRM Organization Unique Name
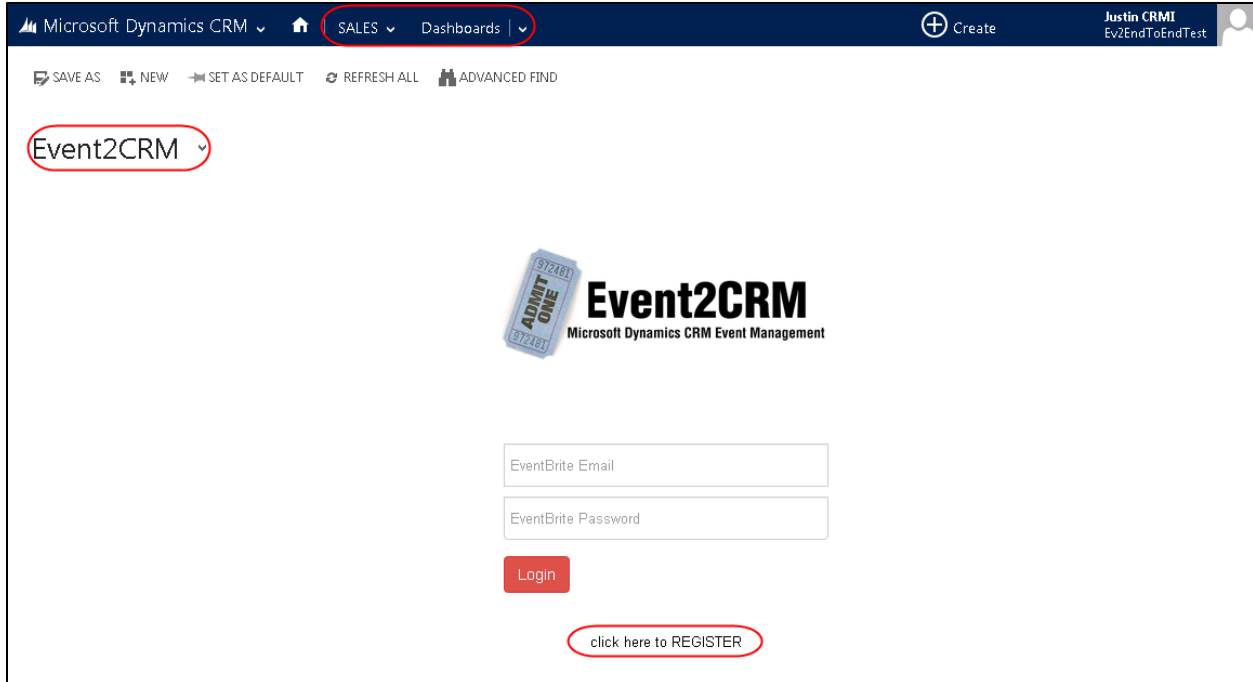   i. Found under Settings | Customizations | Developer Resources

2. Eventbrite Credentials
   a. Eventbrite E-mail
   b. Eventbrite Password

REGISTERING EVENT2CRM

After installing the Event2CRM solution into CRM and before logging in for the first time a new user must register the Event2CRM product.

To do so navigate to the Event2CRM Application from within CRM by going to the **Marketing | Dashboard** area and choosing the Event2CRM dashboard. Or use the Event2CRM application from the web by going to **"https://EV2.CRMInnovation.com"**.

From the Login page, click the "Click here to register" link which will redirect to a Registration page:
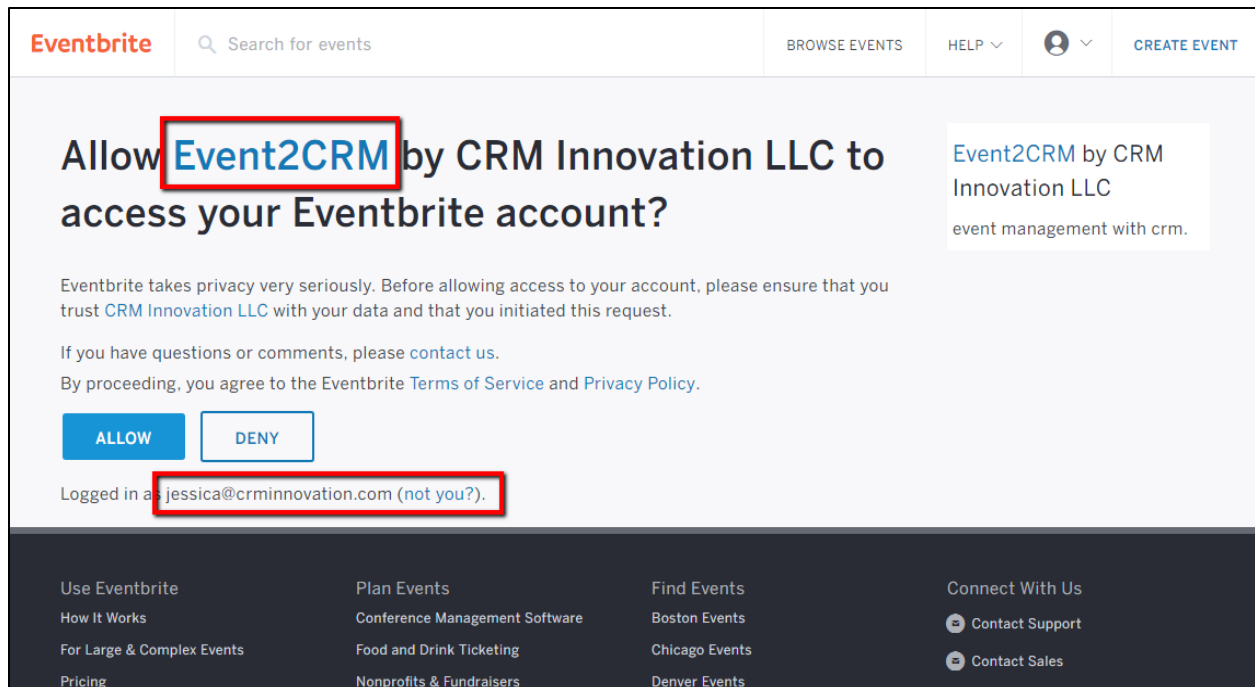
The Registration is a 4 step process. To register enter EB (Eventbrite) Credentials (1.), CRM Credentials (2.), Contact (3.), and Organization (4.) information using the "Next" button to move to the next registration section (and using "Previous" to go back to any registration section).

1a.

*(NOTE: Click the **Authorized Event2CRM Connection** button and get redirected to Eventbrite login page.)*

*(NOTE: Click the **Allow** button to return to registration page with the Eventbrite Personal OAuth Token)*

1b.

*(NOTE: After entering the Eventbrite Credential information click the **Validate EB Credentials** button before moving to the next section.)*

2.

3.

4.

Once all registration information is entered clicking the "Test" button will test the CRM and Eventbrite credentials and make sure a connection can be made.

When the test connection is successful a "Submit" button will appear. Clicking the "Submit" button will save and submit the registration details and redirect to the Login page where the user can now use their login credentials to start the application.
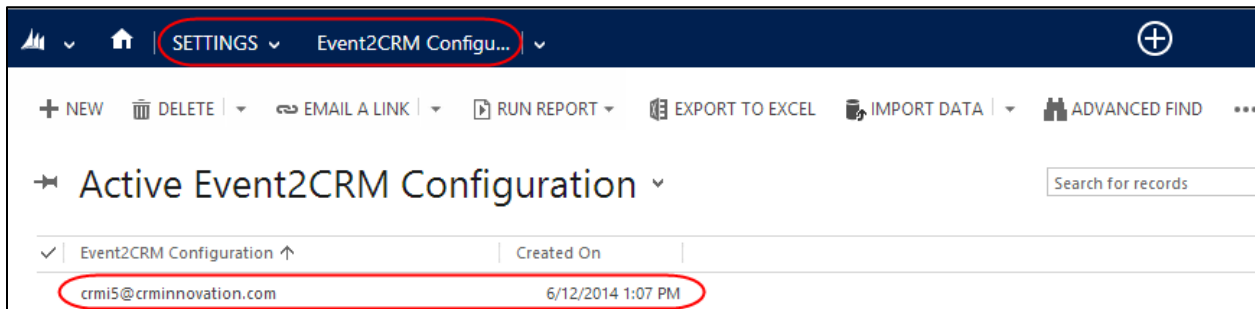
CRM SETUP

EVENT2CRM CONFIGURATION RECORD

After installing the Event2CRM solution and Registering the Event2CRM application as described above you will need check that an Event2CRM Configuration record has been created in CRM.

Navigate to **Settings | Event2CRMConfiguration** (or wherever you placed this entity on your Sitemap in the previous step) using the navigation bar. You should see an Event2CRMConfiguration record that matches the Eventbrite e-mail address you used to register:

(NOTE: If this record is not created please contact our support team at support@crminnovaiton.com.)

SECURITY ROLES

Before using the Event2CRM application the System Administrator security role must be assigned to the CRM user credentials that were used to register Event2CRM (above).
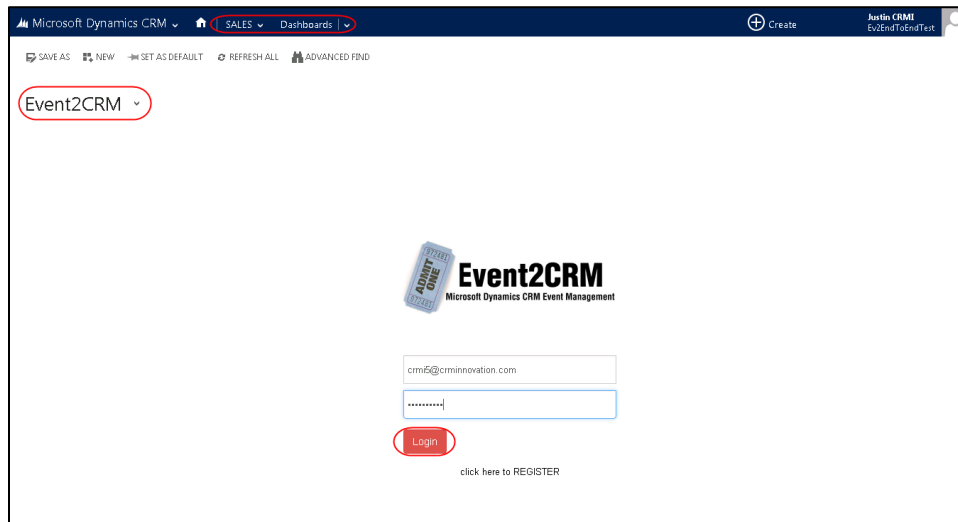
See **APPENDIX A: SECURITY ROLES** for more information.

EVENT2CRM SETTINGS
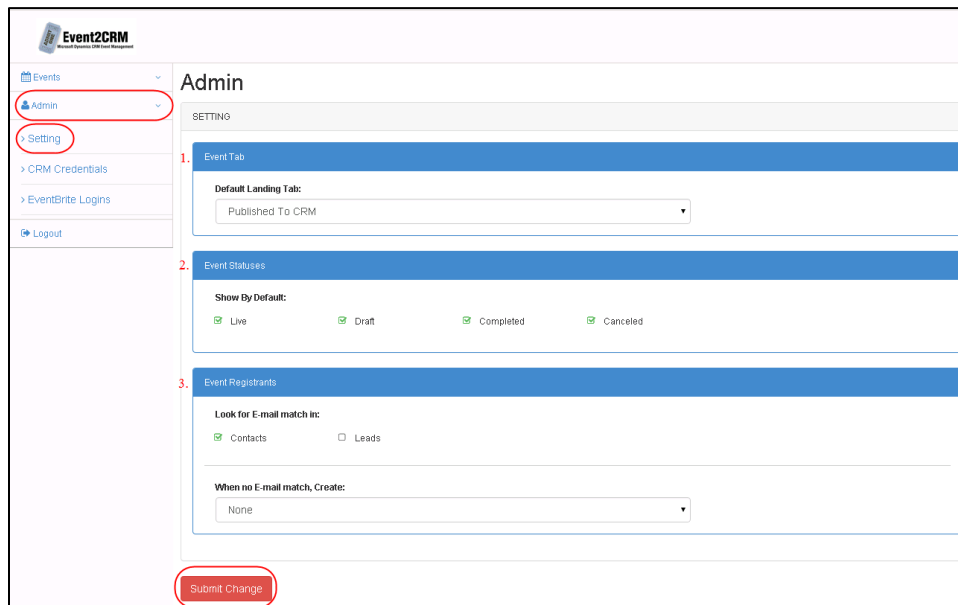
EVENT2CRM APPLICATION SETTINGS

Navigate to the Event2CRM Application from within CRM by going to the **Marketing | Dashboard** area and choosing the Event2CRM dashboard, or use the Event2CRM application from the web by going to **"ev2.crminnovation.com".**

To log into the Event2CRM application enter your Eventbrite e-mail and your Eventbrite password and click the "Login" button.

In the Event2CRM application go to the **Admin | Settings** area and select the settings you would like:

1. Event Tab:

   Default Landing Tab may be set to either "Published to CRM" or "Eventbrite Only" and determines which tab in the Events section is defaulted to after logging in to the application.

2. Event Statuses:

   Show By Default allows the user to set which event statuses (Draft, Live, Completed, Cancelled) are shown by default after logging in, on both of the tabs in the Events section. While logged in you can still adjust what event statuses are shown in either Event table by using the Event Status Filter buttons above the tables but the **Show By Default** settings will be restored when you next login.

3. Event Registrants:

   Look For E-Mail Match In - allows the user to set which entity type(s) the application searches in your CRM system to find a match to the email address provided by the Eventbrite registrants. If a match is found the CRM record will be associated with the Event Registrant record in CRM.

   When No E-Mail Match, Create – allows the user to set which record type (or any at all) is created and associated with the Event Registrant record in CRM if no match to the Eventbrite registrant's email can be found in the CRM system. *(NOTE: If Lead or Contact is selected to be created when no matching record is found make sure that the corresponding **Look For E-Mail Match In** setting (above) to "Y" (checked) or the application could create multiple matching records.)*

Click on **"Submit"** to save the Settings.

APPENDIX A: SECURITY ROLES

Below is the user security role included in the Event2CRM solution (the included Event2CRM Service security role is still in development and will be fully functional in a subsequent release of the solution):
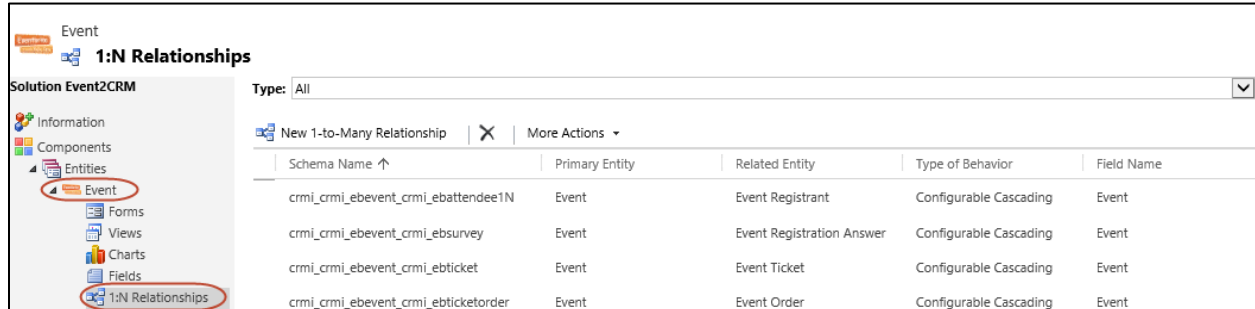
Security Role: Event2CRM User

Entity	Create	Read	Write	Delete	Append	Append To
Event	○	●	●	○	●	●
Event Order	○	●	●	○	●	●
Event Registrant	○	●	●	○	●	●
Event Registration Answer	○	●	●	○	●	●
Event Ticket	○	●	●	○	●	●
Event Venue	○	●	●	○	●	●
Event2CRM Configuration	○	●	○	○	○	○

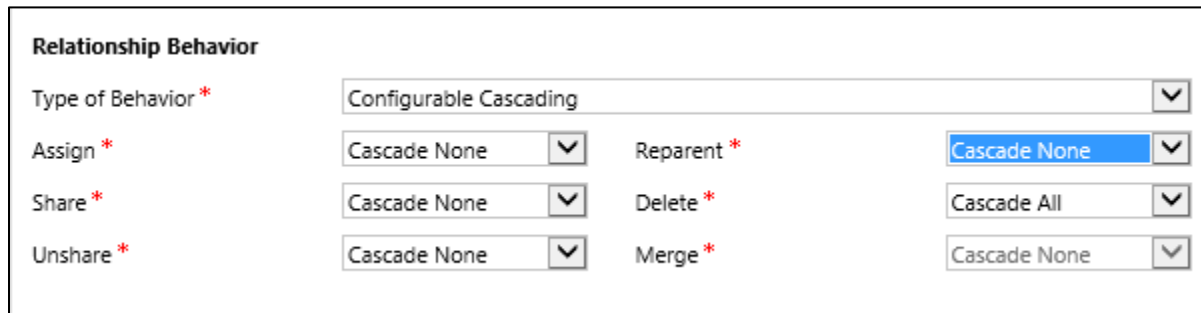To be added to CRM Users who need to interact with the Event2CRM entities in CRM.

APPENDIX B: CRM EVENT 1:N RELATIONSHIP BEHAVIOR

The four main 1:N relationships between the Event entity and the Event Ticket, Event Order, Event Registrant and Event Registrant Answer entities:

Have had their relationship behavior set to the below:

This means when you delete an Event from CRM any related Event Tickets, Event Orders, Event Registrants and Event Registrant Answer records will also be deleted. The Venue and Organizer records associated to the Event will NOT be deleted.