

Event2CRM – Installation & Setup Guide

For Microsoft Dynamics 365 & CRM 2016, 2015, 2013

Plan. Promote. Track.

Any event that requires registration or ticketing.



Event2CRM

Microsoft Dynamics CRM Event Management

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crmlInnovation.com

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INSTALLATION

INSTALLING Event2CRM SOLUTION

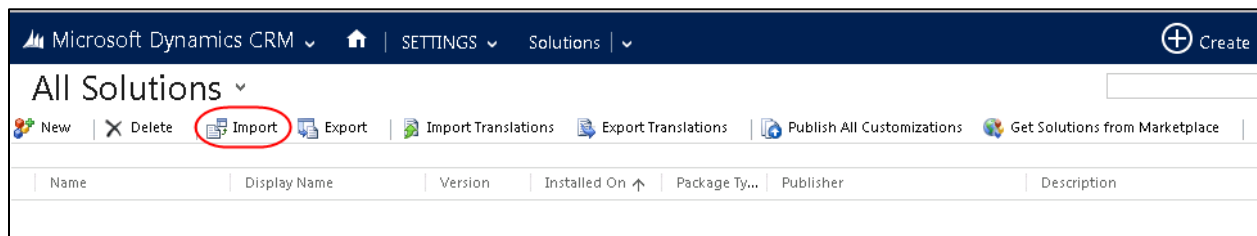
What you will need to do:

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

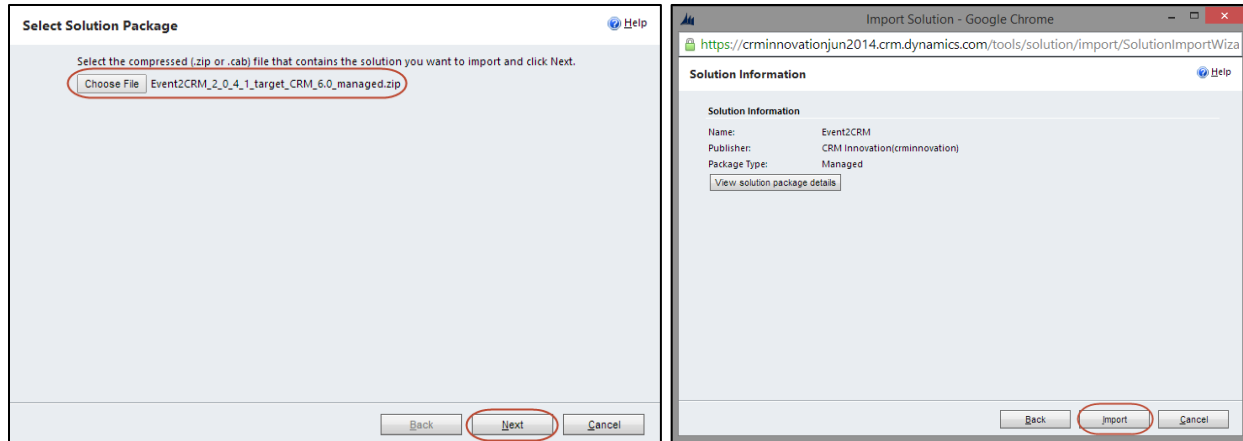
1. Backup the CRM Org Database using SQL Server Management Studio.
2. Export the current CRM Default Solution as backup solution.

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

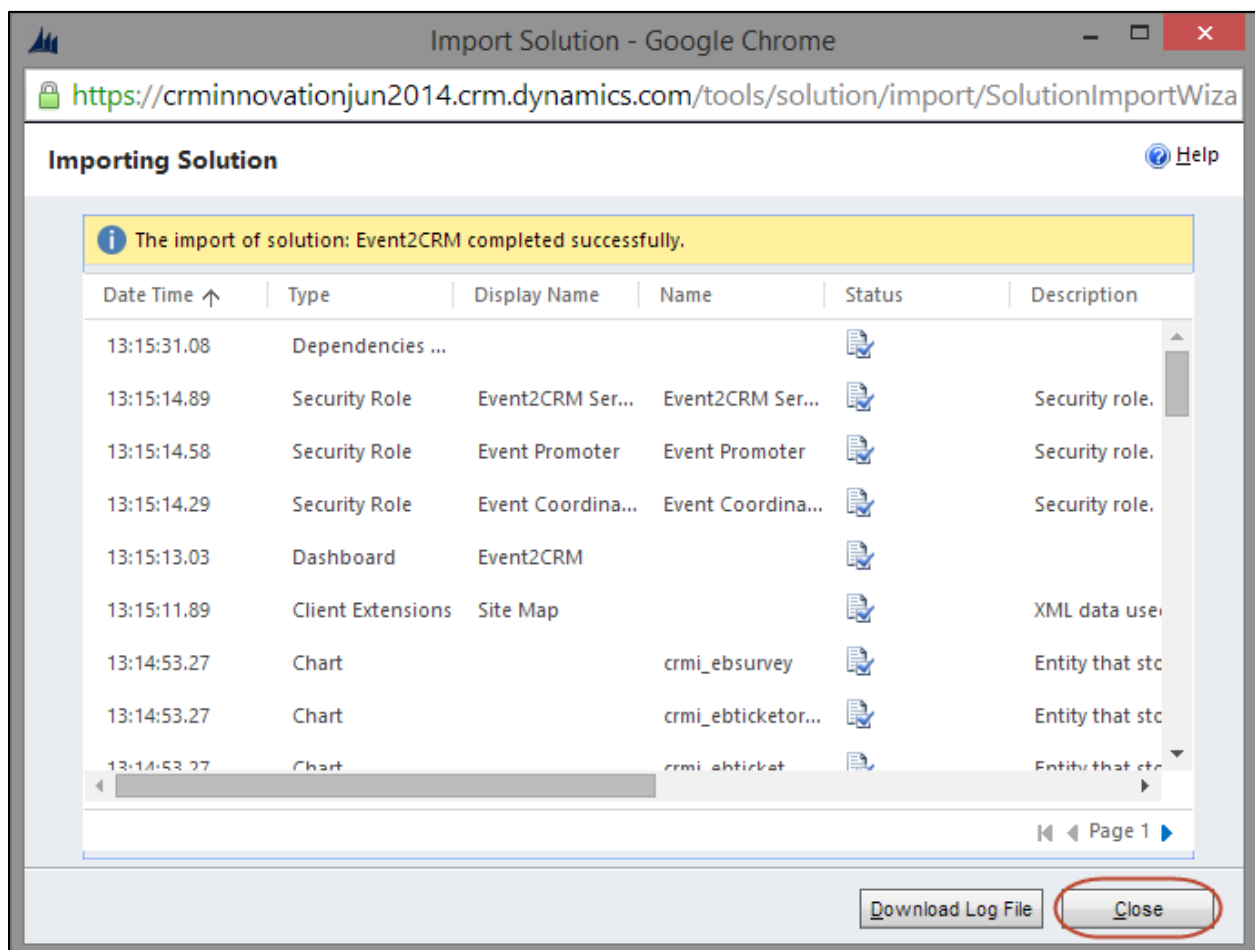
Event2CRM installs like any other MS Dynamics CRM managed solution. Login with a CRM system administrator user account and in MS Dynamics CRM go to **Settings | Solutions** and click on the **Import** button.



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

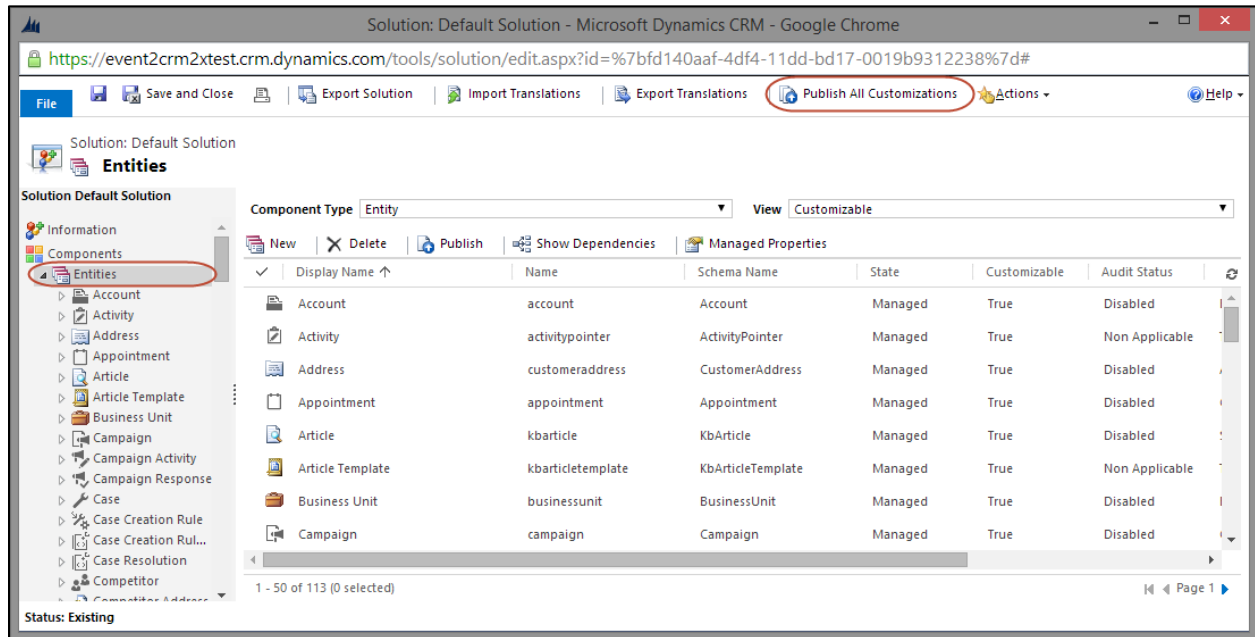
In MS Dynamics CRM navigate to **Settings | Customizations** in the CRM system. Open the Default Solution window by clicking **Customize the System**.

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 your CRM Sitemap by checking the desired area(s) and clicking the save button:

The screenshot shows the Microsoft Dynamics CRM Customization interface. The top navigation bar includes 'SETTINGS' and 'Customizations'. The main content area is titled 'Customization' and features a section 'Which feature would you like to work with?' with two options: 'Customize the System' (highlighted with a red circle) and 'Publishers'. Below this, the 'Solution: Default Solution - Microsoft Dynamics CRM - Google Chrome' is displayed. The left sidebar shows the 'Solution Default Solution' tree with 'Event' selected. The main pane shows the 'Event' entity definition. The 'Entity Definition' section includes fields for 'Display Name' (Event), 'Plural Name' (Events), 'Name' (crmi_ebevent), 'Primary Image', and 'Description' (Crmi Eb Event). The 'Ownership' is set to 'Organization'. The 'Areas that display this entity' section has checkboxes for 'Sales', 'Service', 'Marketing' (checked), and 'Settings' (checked). The 'Options for Entity' section is also visible. The status at the bottom is 'Status: Existing'.

(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.



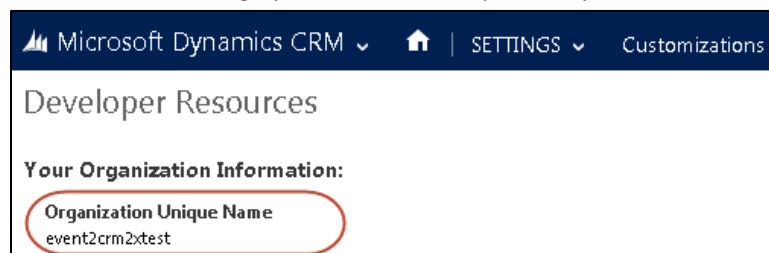
Press **F5** key or click on the browser **Refresh** button to refresh the CRM sitemap.

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



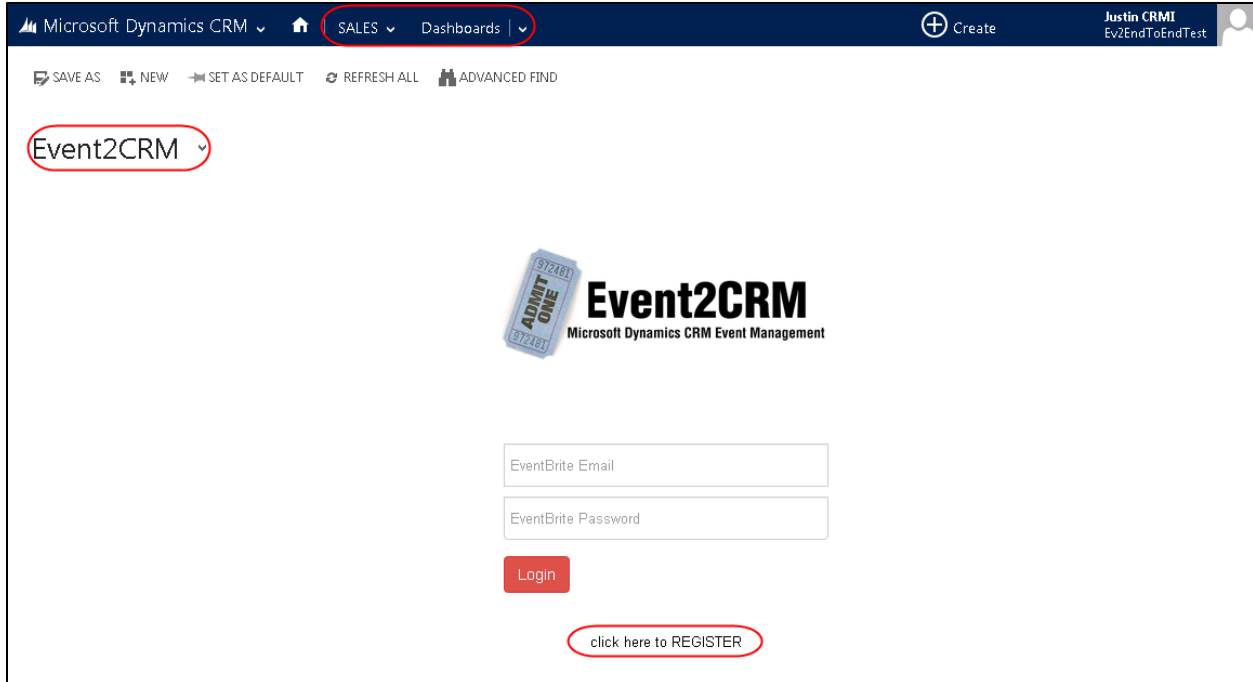
2. Eventbrite Credentials
 - a. Eventbrite E-mail
 - b. Eventbrite Password

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:

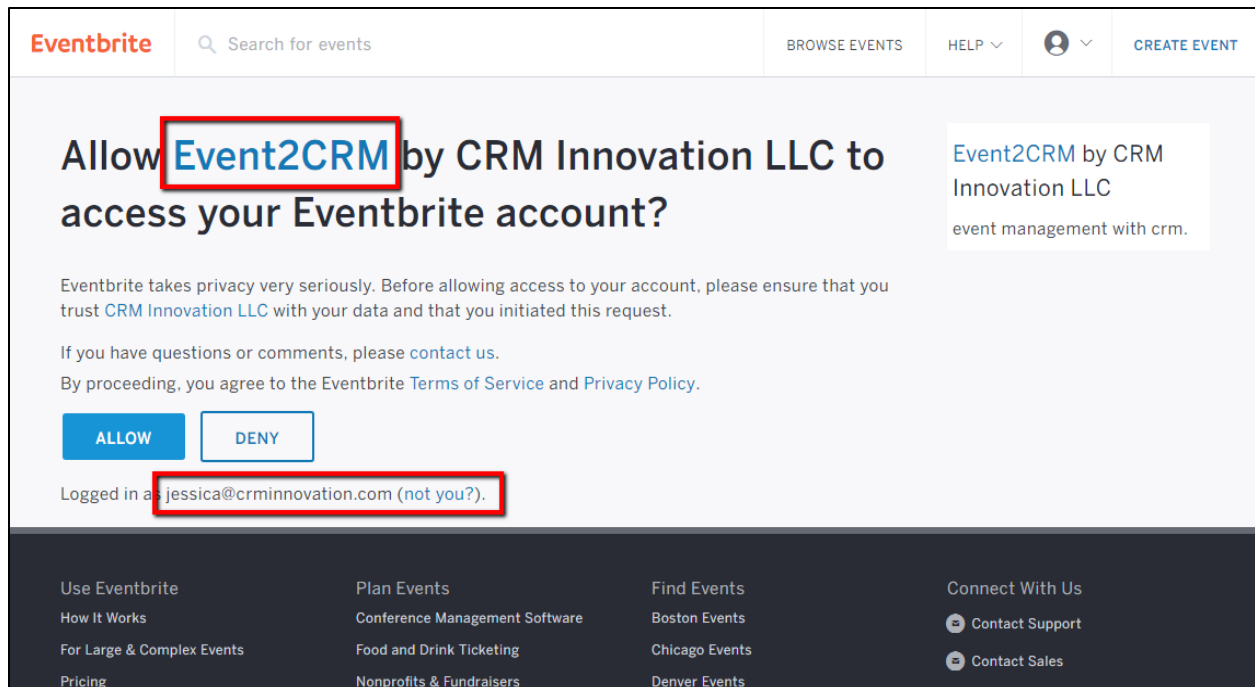


The Registration is a 4 step process. To register enter EB (Eventbrite) Credentials (1.), CRM Credentials (2.), Contact (3.), and Organization (4.) information using the “Next” button to move to the next registration section (and using “Previous” to go back to any registration section).

1a.



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



The screenshot shows the Eventbrite interface for granting access to Event2CRM. At the top, the Eventbrite logo is on the left, and navigation links for 'BROWSE EVENTS', 'HELP', a user profile, and 'CREATE EVENT' are on the right. A search bar is also present. The main heading asks for permission to allow Event2CRM by CRM Innovation LLC to access the account. Below this, a paragraph explains that Eventbrite takes privacy seriously and that the user should trust CRM Innovation LLC. A link to 'contact us' is provided. Below the text are two buttons: 'ALLOW' (highlighted with a red box) and 'DENY'. At the bottom, it says 'Logged in as jessica@crminnovation.com (not you?)' with the email address highlighted in a red box. The footer contains links for 'Use Eventbrite', 'Plan Events', 'Find Events', and 'Connect With Us'.

Eventbrite

Search for events

BROWSE EVENTS

HELP

CREATE EVENT

Allow Event2CRM by CRM Innovation LLC to access your Eventbrite account?

Event2CRM by CRM Innovation LLC
event management with crm.

Eventbrite takes privacy very seriously. Before allowing access to your account, please ensure that you trust CRM Innovation LLC with your data and that you initiated this request.

If you have questions or comments, please [contact us](#).

By proceeding, you agree to the Eventbrite [Terms of Service](#) and [Privacy Policy](#).

ALLOW **DENY**

Logged in as jessica@crminnovation.com (not you?).

Use Eventbrite
How It Works
For Large & Complex Events
Pricing

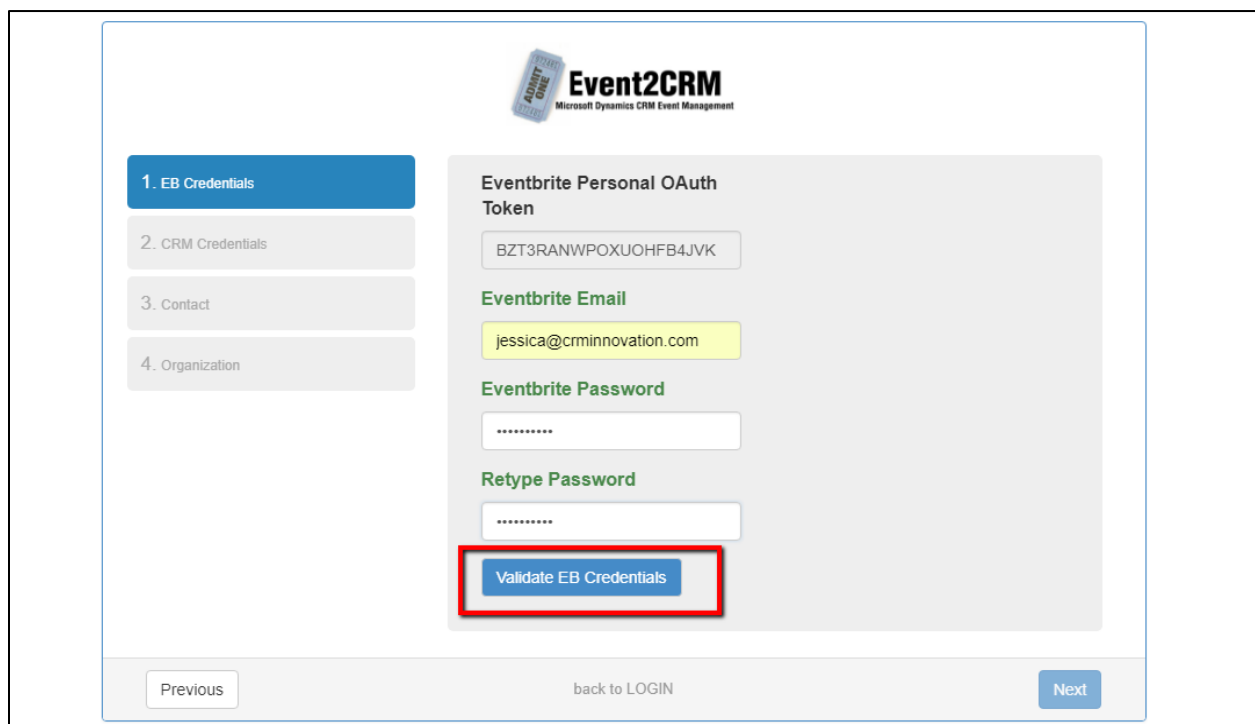
Plan Events
Conference Management Software
Food and Drink Ticketing
Nonprofits & Fundraisers

Find Events
Boston Events
Chicago Events
Denver Events

Connect With Us
Contact Support
Contact Sales

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

1b.



The screenshot shows the Event2CRM registration page. At the top, the Event2CRM logo is displayed. Below it, a list of steps is shown: 1. EB Credentials (highlighted with a blue box), 2. CRM Credentials, 3. Contact, and 4. Organization. The main form area contains the following fields: 'Eventbrite Personal OAuth Token' (with the value BZT3RANWPOXUOHFB4JVK), 'Eventbrite Email' (with the value jessica@crminnovation.com), 'Eventbrite Password' (with a masked value), and 'Retype Password' (with a masked value). A red box highlights the 'Validate EB Credentials' button. At the bottom, there are 'Previous', 'back to LOGIN', and 'Next' buttons.

Event2CRM
Microsoft Dynamics CRM Event Management

1. EB Credentials

2. CRM Credentials

3. Contact

4. Organization

Eventbrite Personal OAuth Token
BZT3RANWPOXUOHFB4JVK

Eventbrite Email
jessica@crminnovation.com

Eventbrite Password


Retype Password

Validate EB Credentials

Previous back to LOGIN Next

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

2.



1. EB Credential

2. CRM Credential

3. Contact

4. Organization

Dynamics CRM User Name
tester@Ev2EndToEndTest.onmicrosoft.c

Dynamics CRM URL
https://ev2endtoendtest.crm.dynamics.co

Dynamics CRM Password


Organization Unique Name
ev2endtoendtest

Retype Password

CRM Deployment Type
CRM Online ▼

Previous back to LOGIN Next

3.



1. EB Credential

2. CRM Credential

3. Contact

4. Organization

First Name
Justin

Email Address
justin@crminnovation.com

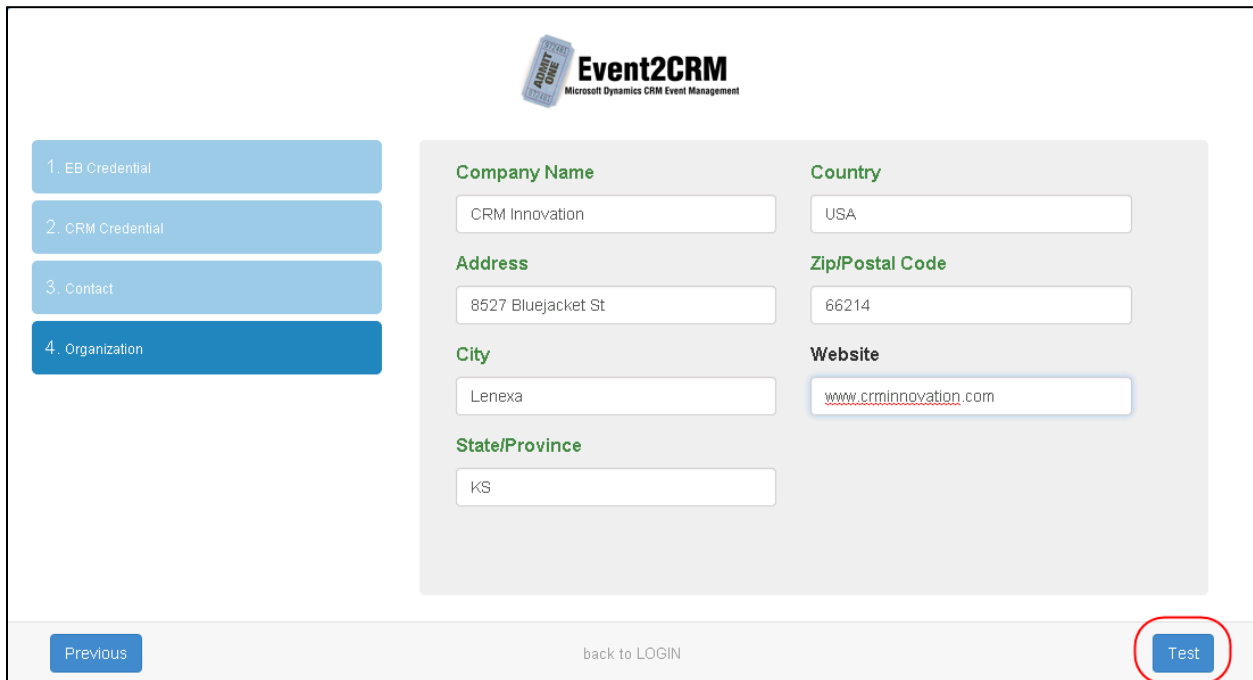
Last Name
CRMI

Retype Email
justin@crminnovation.com

Phone Number
(913) 492-2764

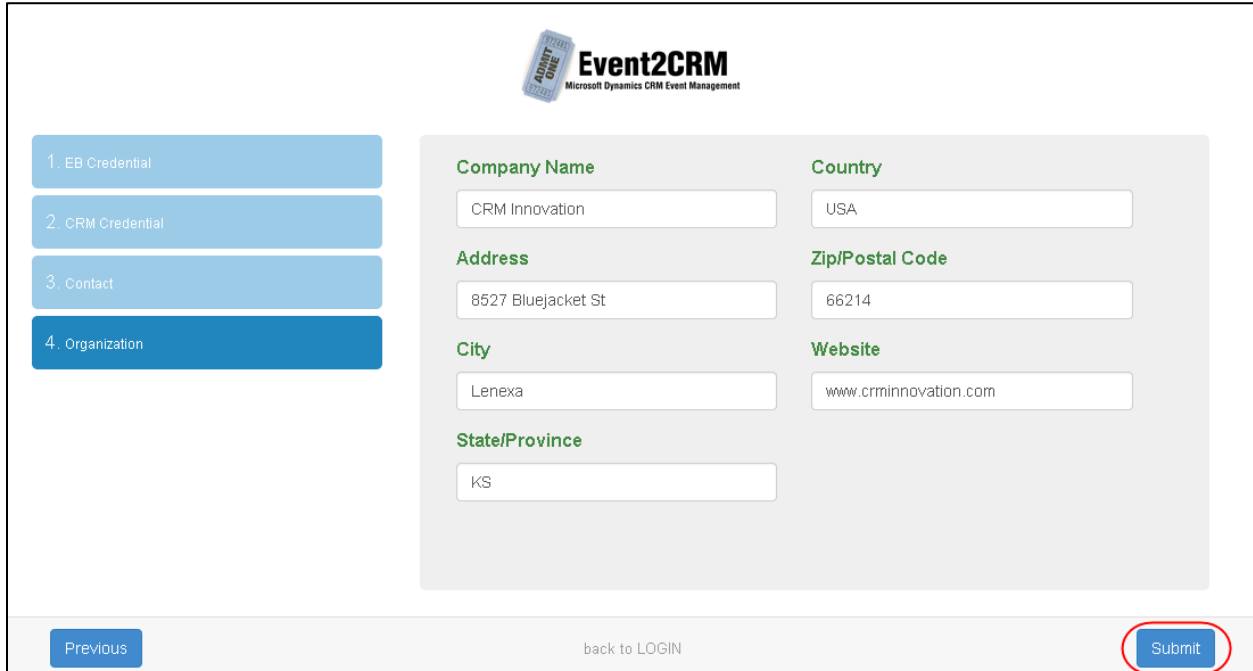
Previous back to LOGIN Next

4.



The screenshot shows the Event2CRM registration form. On the left, there is a vertical list of steps: 1. EB Credential, 2. CRM Credential, 3. Contact, and 4. Organization. The main form area contains fields for Company Name (CRM Innovation), Country (USA), Address (8527 Bluejacket St), Zip/Postal Code (66214), City (Lenexa), Website (www.crminnovation.com), and State/Province (KS). At the bottom, there are three buttons: 'Previous', 'back to LOGIN', and 'Test'. The 'Test' button is highlighted with a red circle.

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.



This screenshot is identical to the previous one, showing the Event2CRM registration form with the same fields and steps. However, the 'Submit' button at the bottom right is now highlighted with a red circle, indicating that the test connection was successful.

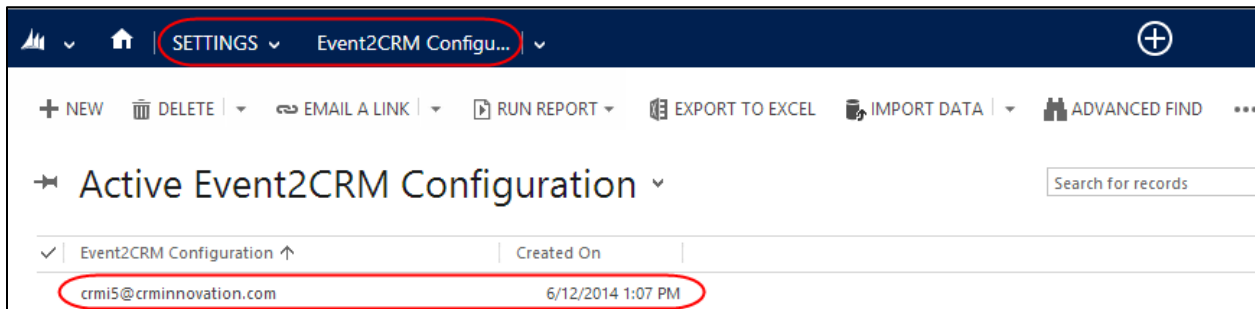
When the test connection is successful a “Submit” button will appear. Clicking the “Submit” button will save and submit the registration details and redirect to the Login page where the user can now use their login credentials to start the application.

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:



The screenshot shows the CRM interface with a dark blue header. The 'SETTINGS' menu is open, and 'Event2CRM Configuration' is selected. Below the header, there is a toolbar with icons for '+ NEW', 'DELETE', 'EMAIL A LINK', 'RUN REPORT', 'EXPORT TO EXCEL', 'IMPORT DATA', and 'ADVANCED FIND'. The main content area shows 'Active Event2CRM Configuration' with a search bar. Below this, a table lists the configuration records. The first record is highlighted with a red circle around the email address 'crmi5@crminnovation.com' and the creation time '6/12/2014 1:07 PM'.

Event2CRM Configuration ↑	Created On
crmi5@crminnovation.com	6/12/2014 1:07 PM

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

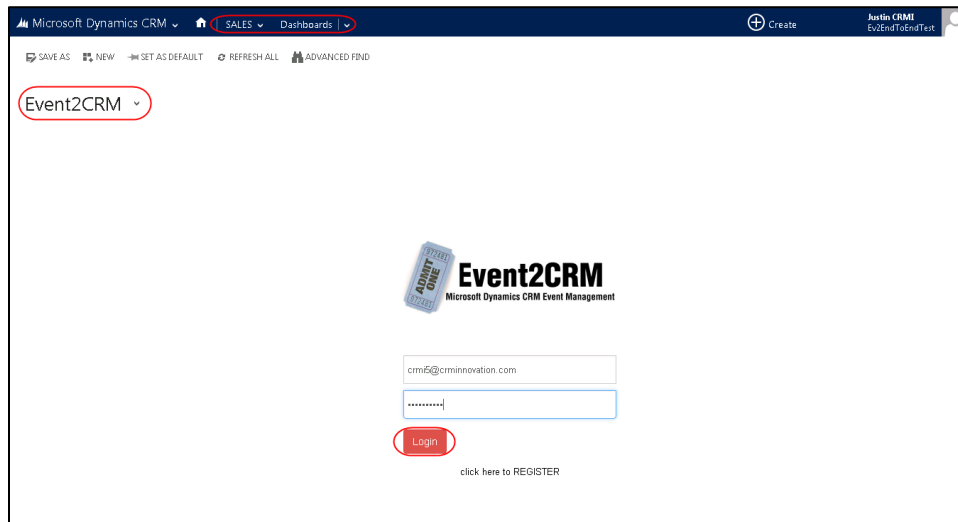
See [APPENDIX A: SECURITY ROLES](#) for more information.

EVENT2CRM SETTINGS

EVENT2CRM APPLICATION SETTINGS

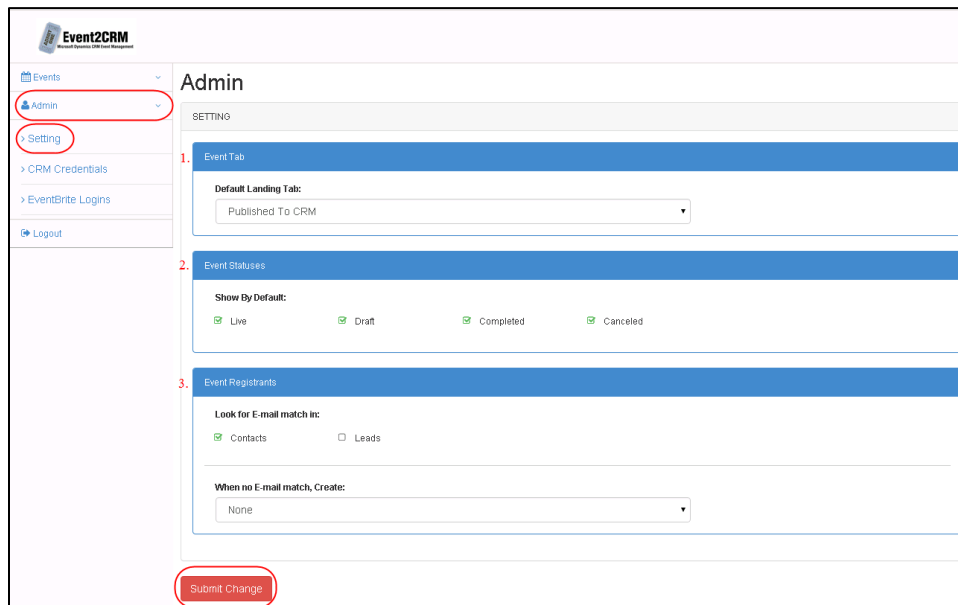
Navigate to the Event2CRM Application from within CRM by going to the **Marketing | Dashboard** area and choosing the Event2CRM dashboard, or use the Event2CRM application from the web by going to “**ev2.crminnovation.com**”.

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



The screenshot shows the Microsoft Dynamics CRM interface. In the top navigation bar, 'SALES' is selected, and 'Dashboards' is expanded. A red circle highlights the 'Event2CRM' option in the dropdown menu. The main content area displays the Event2CRM logo, which includes a calendar icon and the text 'Event2CRM Microsoft Dynamics CRM Event Management'. Below the logo are two input fields: the first contains 'crm@crminnovation.com' and the second contains a masked password '*****'. A red 'Login' button is positioned below the password field. At the bottom, there is a link that says 'click here to REGISTER'.

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



The screenshot shows the Event2CRM Admin Settings page. On the left sidebar, the 'Admin' menu is selected, and 'Setting' is highlighted with a red circle. The main content area is titled 'Admin' and 'SETTING'. It contains three numbered sections: 1. 'Event Tab' with a 'Default Landing Tab:' dropdown set to 'Published To CRM'; 2. 'Event Statuses' with a 'Show By Default:' section containing four checkboxes: 'Live' (checked), 'Draft' (checked), 'Completed' (checked), and 'Canceled' (checked); 3. 'Event Registrants' with a 'Look for E-mail match in:' section containing two checkboxes: 'Contacts' (checked) and 'Leads' (unchecked), and a 'When no E-mail match, Create:' dropdown set to 'None'. A red circle highlights the 'Submit change' button at the bottom left.

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):



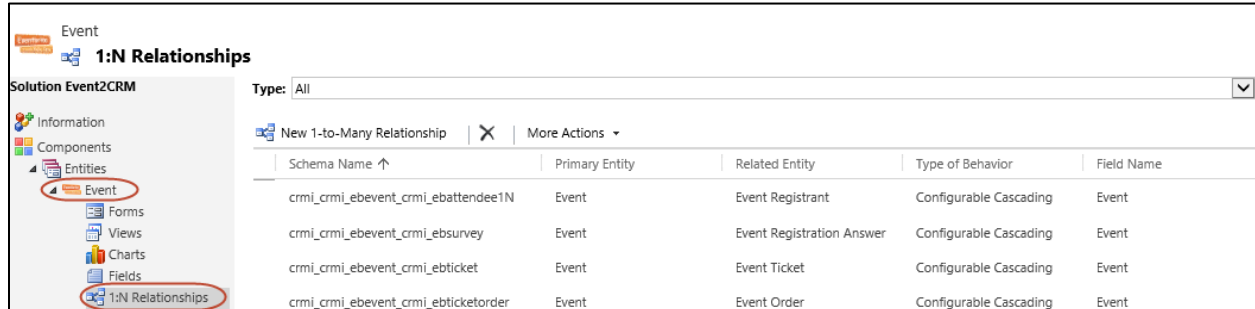
Security Role: Event2CRM User

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization
Entity	Create	Read	Write	Delete	Append	Append To	
Event	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
Event Order	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
Event Registrant	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
Event Registration Answer	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
Event Ticket	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
Event Venue	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
Event2CRM Configuration	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

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

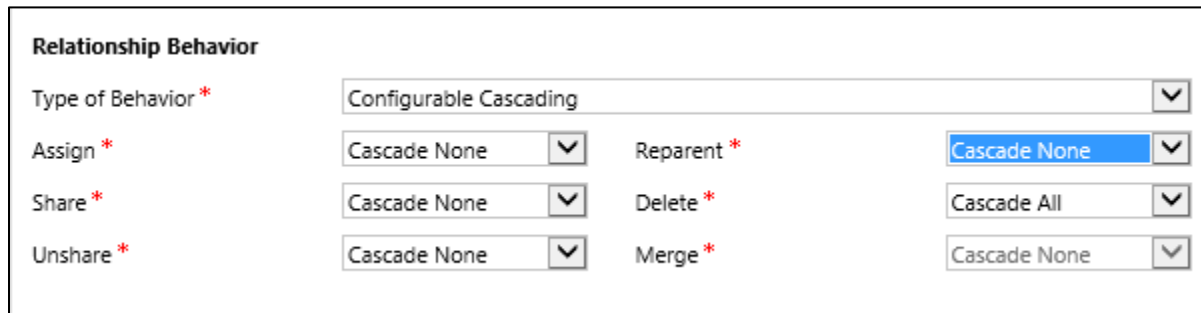
APPENDIX B: CRM EVENT 1:N RELATIONSHIP BEHAVIOR

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



Schema Name ↑	Primary Entity	Related Entity	Type of Behavior	Field Name
crmi_crm_i_ebevent_crm_i_ebattendee1N	Event	Event Registrant	Configurable Cascading	Event
crmi_crm_i_ebevent_crm_i_ebsurvey	Event	Event Registration Answer	Configurable Cascading	Event
crmi_crm_i_ebevent_crm_i_ebticket	Event	Event Ticket	Configurable Cascading	Event
crmi_crm_i_ebevent_crm_i_ebticketorder	Event	Event Order	Configurable Cascading	Event

Have had their relationship behavior set to the below:



Relationship Behavior	
Type of Behavior *	Configurable Cascading
Assign *	Cascade None
Share *	Cascade None
Unshare *	Cascade None
Reparent *	Cascade None
Delete *	Cascade All
Merge *	Cascade None

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.