datom software development

Dokumentation: „CleverReach Connector“

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1 Content

2 Introduction 2
3 Functionality 2
4 Installation 2
5 Configuration 2
6 Configuration JSON 4
7 Trigger 4
7.1 Campaign 4
7.2 Campaign activity 5
7.3 Marketing List 6
7.4 Company 7
7.5 Contact 8
7.6 Lead 9
8 Install checklist in other form 10
9 Special cases 13
10 Flows 13
10.1 Update synchronization CleverReach 16
10.2 CleverReachToCrm 16
11 Troubleshooting 18

2 Introduction

The CleverReach Connector forms an interface between Microsoft Dynamics 365 Customer Engagement and the newsletter provider CleverReach. Recipient lists are automatically created in CleverReach based on data records like campaigns, marketing lists or campaign activities. The prerequisite for this is that the synchronization with CleverReach has been activated in the respective data record and that the appropriate newsletter has been selected in the respective contact or lead.

3 Functionality

If a campaign, marketing list or campaign activity in the CRM is synchronized with CleverReach and a type of newsletter is selected in the checklist, a new recipient list is created in CleverReach with the name of the record and the associated contacts or leads that have selected the same newsletter type.

As soon as changes are made to one of these records, such as adding or removing a contact or changes within the contact, the changes are directly transferred to CleverReach and the respective recipient lists or contacts are updated.

4 Installation

There are several plugins that run on the entities "Marketing List", "Campaign" and "Campaign Activity", for this the "datom_CleverReachInterface" solution and the "datom_config" solution must be installed. Once everything is configured, only the "SDK message processing steps datom.Crm. CleverReach.Plugin. *" must be activated.

5 Configuration

The configuration is done in the settings → extension via the datom configuration.

Key	Parent	Description
cleverreach	-	Is the universal key and therefore the top element.
connectiondata	cleverreach	This is an organizational container for the connection data to CleverReach.
deletionsettings	cleverreach	This is an organizational container for setting the deletion behavior.
groupsetting	cleverreach	This is an organizational container for the group settings
licence	cleverreach	Without a license from datom the module is not executable.
newslettertypsettings	cleverreach	This element is an organizational container for configuration of the checklist for newsletter types.
transfersettings	cleverreach	The following is an organizational container for the transfer settings
apiurl	connectiondata	This is the base URL for the rest API

clientid	connectiondata	Client ID of the OAuth apps at CleverReach (CR -> My Account -> Extras -> REST API)
clientsecret	connectiondata	Encrypted secret key of the OAuth apps at CleverReach (CR -> My Account -> Extras -> REST API) The field "encrypted" must be set to "Yes".
deletecampaign	deletionsettings	Should the groups be deleted in CleverReach when the corresponding campaigns are deleted in CRM? true = groups are deleted | false = groups remain
deletedisablesynchronization	deletionsettings	Should the CR group be deleted if the field ""Provide as group in CleverReach"" is changed to No? true = group is deleted | false = group remains
deleteprotection	deletionsettings	Should the deletion protection in CleverReach be activated for groups that are synchronized from the CRM? true = delete protection active | false = delete protection deactivated
priority	deletionsettings	What is the priority of the CR - extinguishing protection? 0 = the interface is allowed to delete despite deletion protection 1 = the interface must not delete when deletion protection is active (sets ""Deactivate synchronization"" if necessary) & ""Delete Campaigns"" is invalid) 2 = the interface may only delete if the campaign is deleted and ""Delete campaigns"" is set to on (overrides ""Deactivate synchronization"" if necessary)
groupprefix	group settings	This prefix is inserted in CleverReach before the campaign names.
typjson	newsletter settings	Here you can set which types of newsletters should be sent.
entity	transfersettings	Here you set whether customers, companies and/or leads should be transferred to CleverReach.

6 Configuration JSON

Example for JSON:

[{"id":0, "state":0, "description": "information", "modifiedby":"", "modifiedon":"", "position":1}, {"id":1,"state":0,"description":"advertising and games","modifiedby":""","modifiedon":"","position":0}]

Explanation of the individual attributes:

Id:	Unique identifier for the newsletter type of the data type integer
State:	The state indicates whether the radio button is not selected (0), has a green check mark (1) or a red cross (2). The default value is 0, which is also an integer.
Description:	Specifies the visible label of the newsletter.
Modifiedby:	This field can be left empty, as it is only necessary for further processing.
Modifiedon:	This field can also be left empty, as it is also only necessary for further processing.
Position:	Indicates the position in the checklist at which the respective newsletter should safely be placed. The value is incremented as integer from 0.

7 Trigger

7.1 Campaign

Creating a campaign

Trigger: A campaign that is synchronized with CR is created.

Result: List of recipients with recipients was created in CR.

Changing the selection in the checklist

Trigger: The selection of the newsletter in the checklist is changed.

Result: Recipients who have accepted the respective newsletter are added to the recipient list and recipients who have not accepted the newsletter are removed from the recipient list in CleverReach.

Change in the field "Synchronize with CleverReach

Trigger: The value of the field is changed to "Yes" or "No".

Result: If "Yes" is selected, a list of recipients is created based on the campaign in CR. If you choose "No", the already created list of recipients will be deleted from CR.

Change in the "Name" field

Trigger: The name of the campaign is changed.

Result: The name of the recipient list is updated in CR.

Change in the status of the campaign

Trigger: The campaign is activated or deactivated.

Result: If the campaign is deactivated, the field "Synchronize with CleverReach" is automatically set to "No". If the campaign is activated again and the field "Synchronize with CleverReach" has the value "Yes", the campaign is transferred to CR as a recipient list.

Special feature: The execution is synchronous and therefore it may take a little longer.

Deleting the campaign

Trigger: The campaign is deleted in the CRM.

Result: The recipient list in CR is removed together with the recipients.

Remove a lead or marketing list

Trigger: A lead or marketing list is removed from the campaign.

Result: Leads or contacts from marketing lists are removed from the recipient list.

Adding a lead or a marketing list

Trigger: A lead or marketing list is added to the campaign.

Result: Leads or contacts from marketing lists that have subscribed to the appropriate newsletter are added to the recipient list.

7.2 Campaign activity

Create a campaign activity

Trigger: A campaign activity synchronized with CR is created.

Result: List of recipients with recipients was created in CR.

Changing the selection in the checklist

Trigger: The selection of the newsletter in the checklist is changed.

Result: Recipients who have accepted the respective newsletter are added to the recipient list and recipients who have not accepted the newsletter are removed from the recipient list in CleverReach.

Change in the field "Synchronize with CleverReach

Trigger: The value of the field is changed to "Yes" or "No".

Result: If "Yes" is selected, a recipient list of recipients is created based on the campaign activity in CR. If you choose "No", the already created recipient list with the recipients will be deleted from CR.

Change in the status of the campaign activity

Trigger: The campaign activity is activated or deactivated.

Result: When the campaign activity is deactivated, the field "Synchronize with CleverReach" is automatically set to "No". If the campaign activity is activated again and the field "Synchronize with CleverReach" has the value "Yes", the campaign activity is transferred to CR as a recipient list.

Special feature: The execution is synchronous and therefore it may take a little longer.

<u>Change in the description of the campaign activity</u>

Trigger: The description of the campaign activity is changed.

Result: The description is also updated in the recipient list in CR.

<u>Change the subject of the campaign activity</u>

Trigger: The subject of the campaign activity is changed.

Result: The name of the recipient list is also updated in CR.

<u>Delete the campaign activity</u>

Trigger: The campaign activity is deleted in the CRM

Result: The recipient list in CR is removed together with the recipients.

<u>Remove a contact or marketing list</u>

Trigger: A lead or marketing list is removed from the campaign activity.

Result: Leads or contacts from marketing lists are removed from the recipient list.

<u>Adding a contact or marketing list</u>

Trigger: A lead or marketing list is added to the campaign activity.

Result: Leads or contacts from marketing lists that have subscribed to the appropriate newsletter are added to the recipient list.

7.3 Marketing list

<u>Creating a marketing list</u>

Trigger: A marketing list synchronized with CR is newly created.

Result: List of recipients with recipients was created in CR.

<u>Changing the selection in the checklist</u>

Trigger: The selection of the newsletter in the checklist is changed.

Result: Recipients who have accepted the respective newsletter are added to the recipient list and recipients who have not accepted the newsletter are removed from the recipient list in CleverReach.

<u>Change in the field "Synchronize with CleverReach</u>

Trigger: The value of the field is changed to "Yes" or "No".

Result: If "Yes" is selected, a recipient list of recipients is created based on the campaign activity in CR. If you choose "No", the already created recipient list with the recipients will be deleted from CR.

<u>Change in the status of the marketing list</u>

Trigger: The marketing list is activated or deactivated.

Result: When the marketing list is deactivated, the field "Synchronize with CleverReach" is automatically set to "No". If the marketing list is activated again and the field "Synchronize with CleverReach" has the value "Yes", the marketing list is transferred to CR as a recipient list.

Special feature: The execution is synchronous and therefore it may take a little longer.

Change of the name of the marketing list

Trigger: The name of the marketing list is changed.

Result: The name of the recipient list in CR is also updated.

Change of the query of a dynamic marketing list

Trigger: Changing the query of which contacts should be added to the marketing list is changed in a dynamic list.

Result: Contacts that are newly added and have accepted the respective newsletter are transferred to the recipient list in CR. If contacts are removed from the marketing list by the new query, they are also removed from the recipient list in CR.

Deleting the marketing list

Trigger: The marketing list is deleted in the CRM.

Result: The marketing list in CR is removed together with the recipients.

Removing a contact using the search

Trigger: A contact is removed from the marketing list using the search.

Result: The contact is removed from the recipient list in CR.

Adding a contact using search

Trigger: A contact is added to the marketing list using the search.

Result: The contact is added to the recipient list in CR.

Removing a contact using the advanced search

Trigger: A contact is removed from the marketing list using the advanced search.

Result: The contact is removed from the recipient list in CR.

Adding a contact using the advanced search

Trigger: A contact is added to the marketing list using the advanced search.

Result: The contact is added to the recipient list in CR.

7.4 Company

Change of name of the company

Trigger: The company name is changed.

Result: The company name in CR is also updated.

Change of the primary contact of the company

Trigger: The primary contact of a company is changed.

Result: The recipient in the affected recipient lists is updated.

Change in the status of the company

Trigger: The company is activated/deactivated.

Result: If the company is deactivated, the company's primary contact is removed from all linked recipient lists.

Deleting the company

Trigger: The company is deleted in the CRM.

Result: The primary contact of the company is removed from all linked recipient lists in CR.

7.5 Contact

Creating a contact

Trigger: A new contact is created in CRM and matches the query in a dynamic list.

Result: The contact is added to the respective recipient list as a new recipient.

Changing the selection in the checklist

Trigger: The selection of the newsletter in the checklist is changed.

Result: The contact is added or removed in CR in a recipient list.

Change of contact's e-mail address

Trigger: The e-mail address of a contact is changed in the CRM.

Result: The e-mail address stored in the recipient list in CR is also updated.

Changing the form of address of a contact

Trigger: The salutation of a contact is changed in the CRM.

Result: The salutation of the recipient in the recipient list in CR is updated.

Change of name of a contact

Trigger: The company of a contact is changed in the CRM

Result: The company of the recipient in the recipient list in CR is updated.

Changing the last name or first name of a contact

Trigger: The first or last name of the contact is changed in the CRM.

Result: The first or last name of the recipient is updated in CR.

Change in the status of the contact

Trigger: The contact is activated/deactivated.

Result: If the contact is deactivated, the contact is removed from all linked recipient lists.

Deleting a contact

Trigger: A contact is deleted in CRM

Result: The recipient in CR is deleted from all recipient lists in which it was stored.

7.6 Lead

Creating a Lead

Trigger: A new lead is created in CRM and matches the query in a dynamic list.

Result: The lead is added to the recipient list as a new recipient.

Changing the selection in the checklist

Trigger: The selection of the newsletter in the checklist is changed.

Result: The lead is added or removed in CR in a recipient list.

Change of the e-mail address of the lead

Trigger: The e-mail address of a lead is changed in the CRM.

Result: The e-mail address stored in the recipient list in CR is also updated.

Changing the title of a lead

Trigger: The salutation of a lead is changed in the CRM.

Result: The salutation of the recipient in the recipient list in CR is updated.

Changing the company name of a lead

Trigger: The company name of a lead is changed in CRM.

Result: The company name of the recipient in the recipient list in CR is updated.

Change of the last name or first name of a lead

Trigger: The first or last name of the contact is changed in the CRM.

Result: The first or last name of the recipient is updated in CR.

Change to the status of the lead

Trigger: The lead is activated/deactivated.

Result: If the contact is deactivated, the lead is removed from all linked recipient lists.

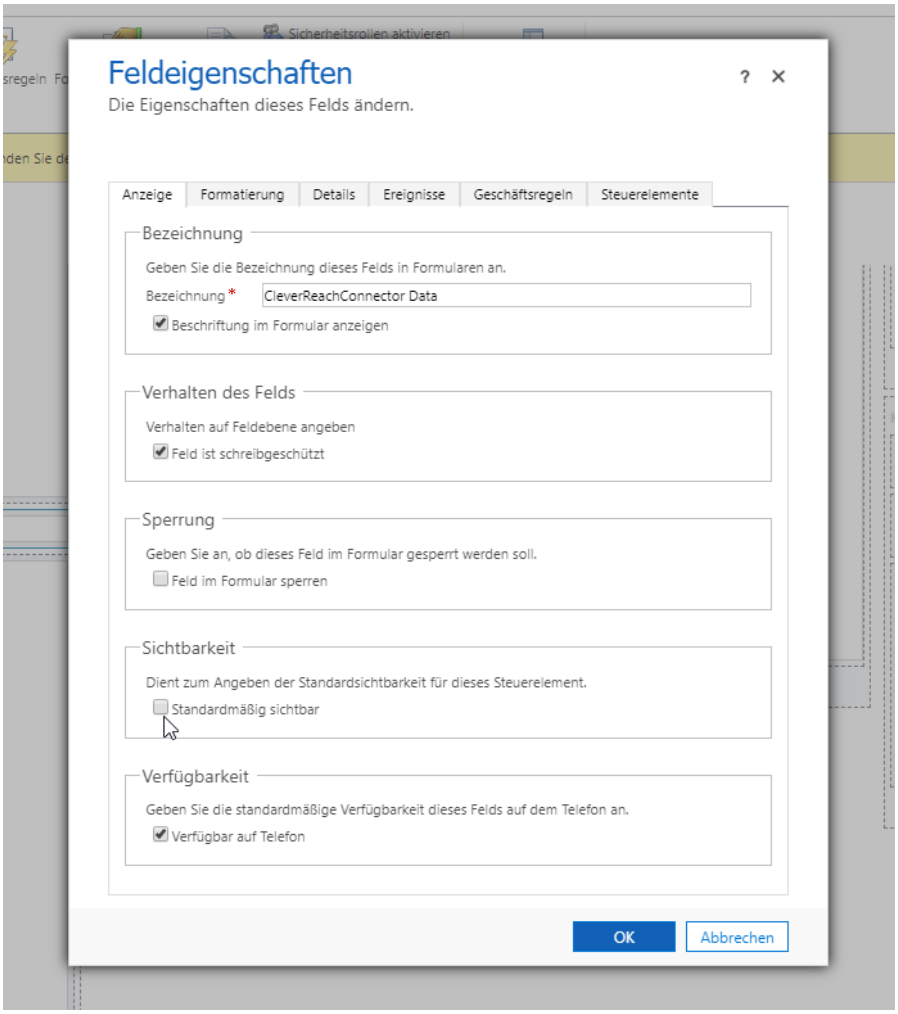
Deleting a Lead

Trigger: A lead is deleted in CRM

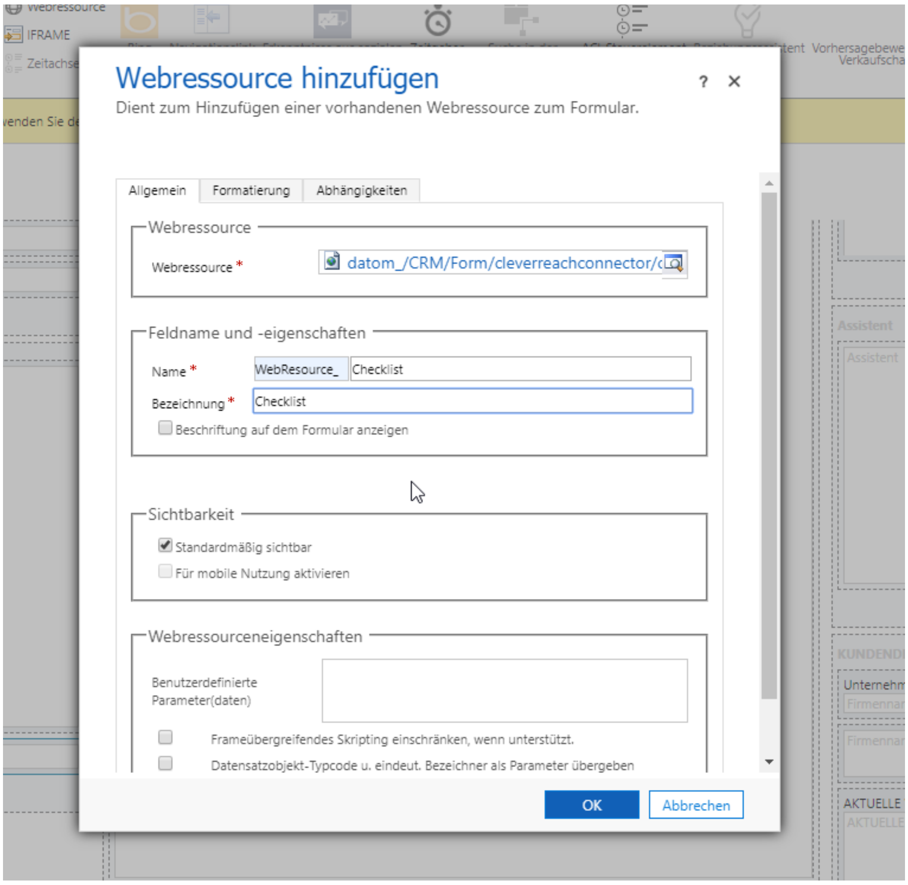
Result: The recipient in CR is deleted from all recipient lists in which it was stored.

8 Install checklist in other form

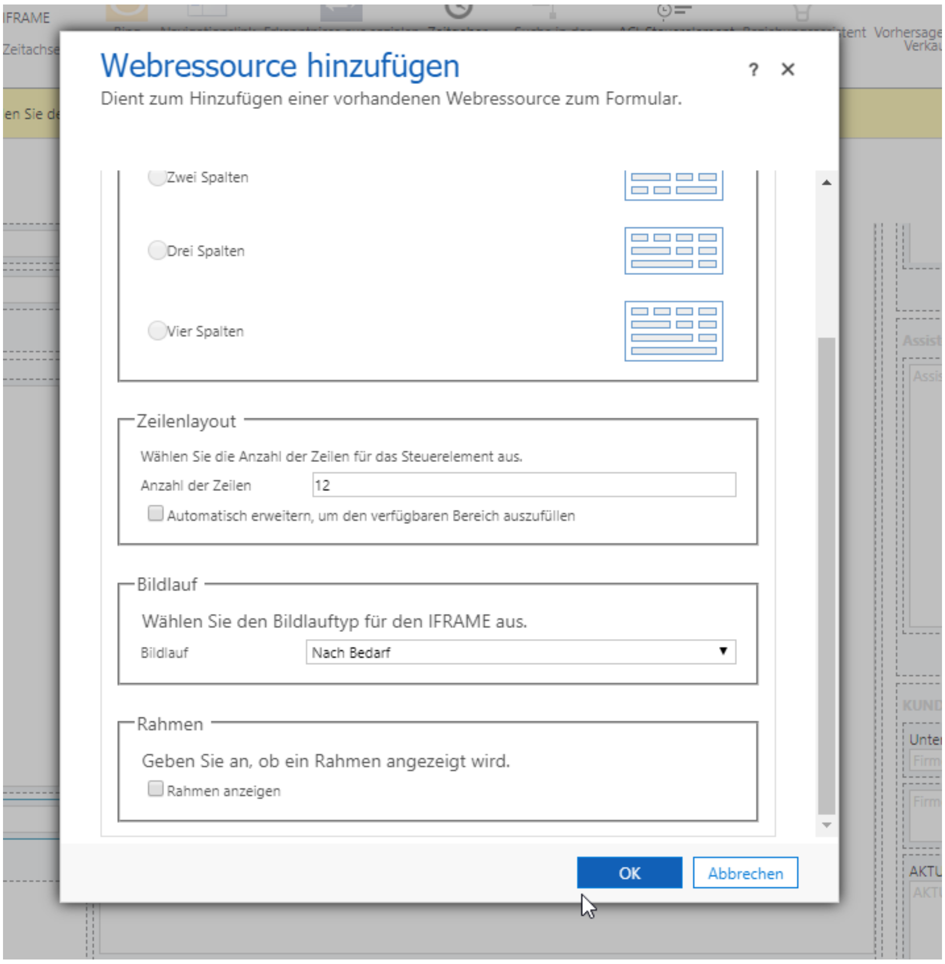
To use the checklist in your own forms, you have to integrate the field "CleverReachConnector Data" into your form. Afterwards, change the visibility of the field by unchecking "Visible by default".



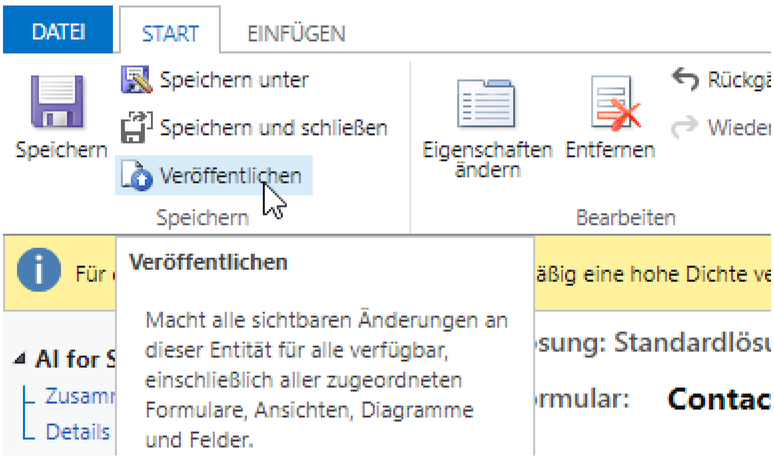
Afterwards you have to integrate the web resource into the form. Search for "datom_/CRM/Form/cleverreachconnector/checklist.html" and insert it at the desired position. Afterwards, the web resource must be given a name and a description.



Under the Formatting tab, "One column" must then be selected, the number of lines must be set to 12 and the check mark for "Show frame" must be removed.



Then click on "Publish" in the start menu.



9 Special cases

Before sending emails from recipient lists created based on dynamic marketing lists, the "Update Synchronization CleverReach" flow should be executed in the CRM, as it can happen that with dynamic marketing lists, the recipient list is not updated in CleverReach for all triggers.

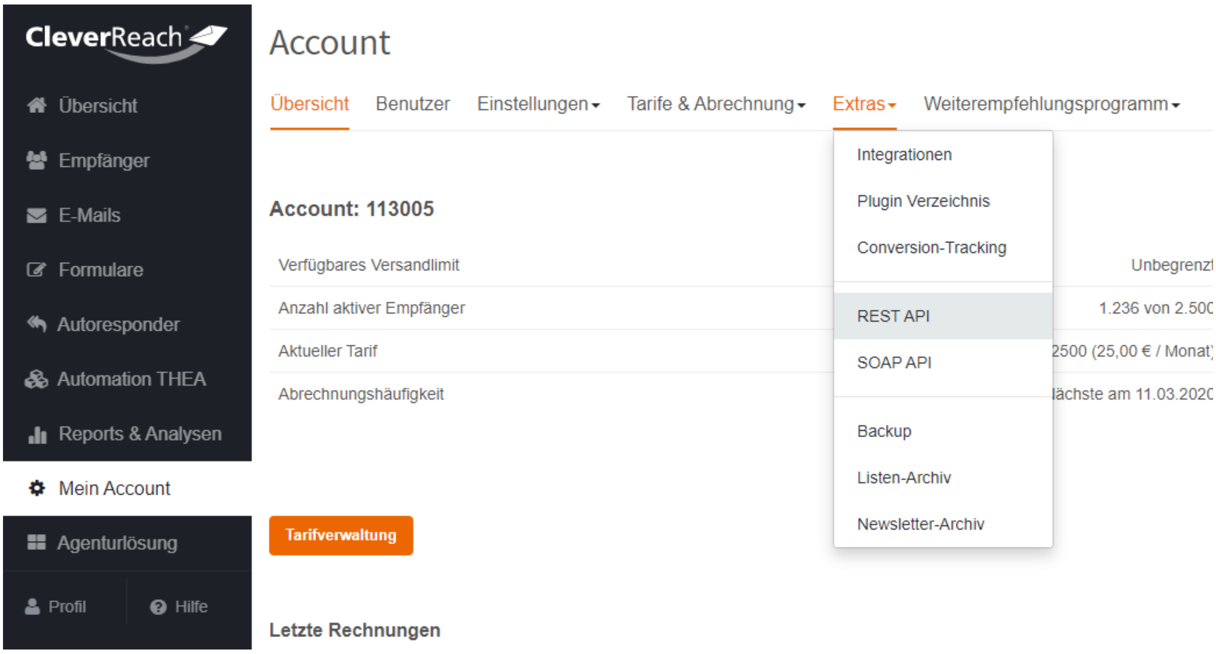
10 Flows

10.1 Authentication in the CleverReach Connector

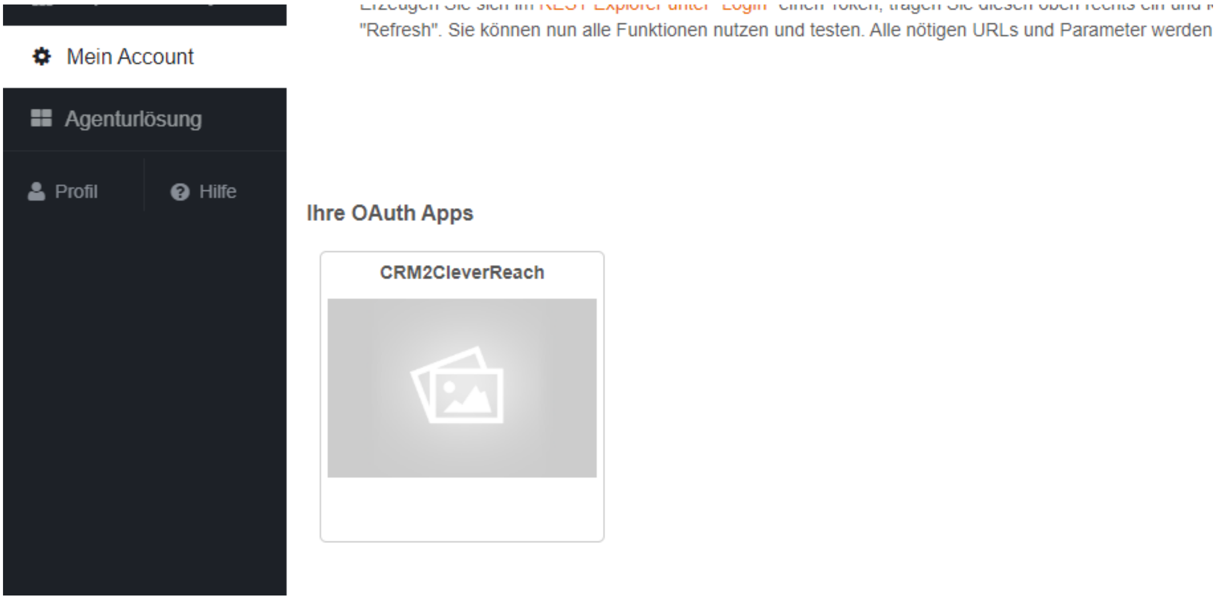
The CleverReach connector serves as the basis for the flows, since the flow can access the data in CleverReach via the connector.

In order to access CleverReach, one must first authenticate in the connector with the data from CleverReach.

To do so, navigate in CleverReach to "My Account" → "Extras" → "REST API",

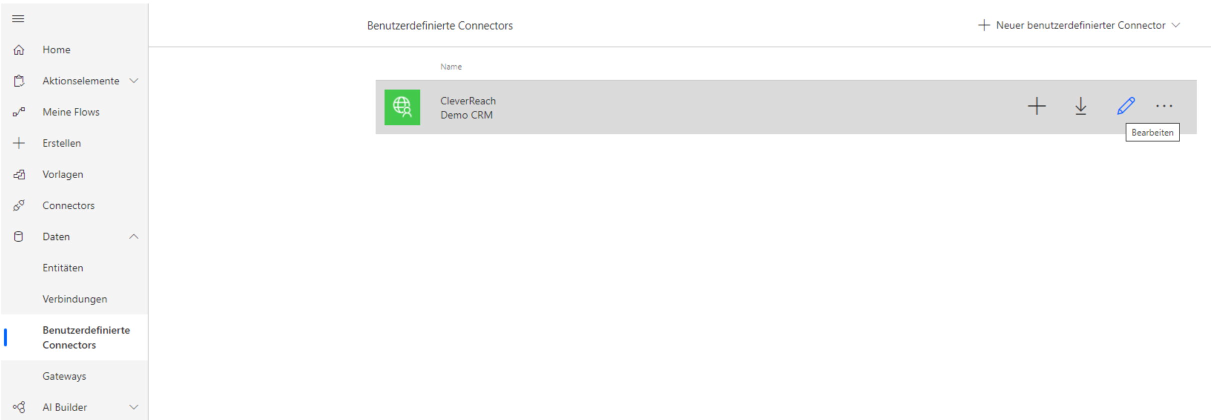


then under the section "Your OAuth Apps" the picture with the caption "CRM2CleverReach" is opened.

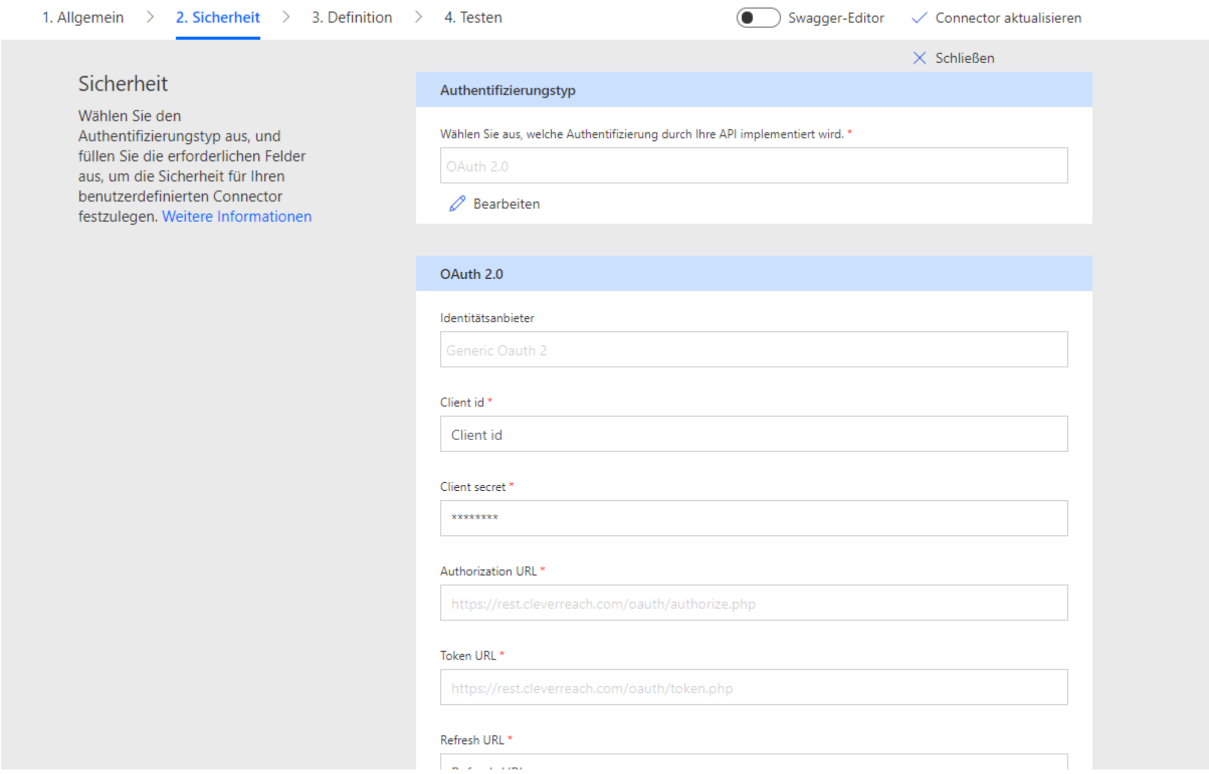


There the content of the fields Client ID, Client Secret, Authorize URL and Token URL is copied and entered into Microsoft Power Automate.

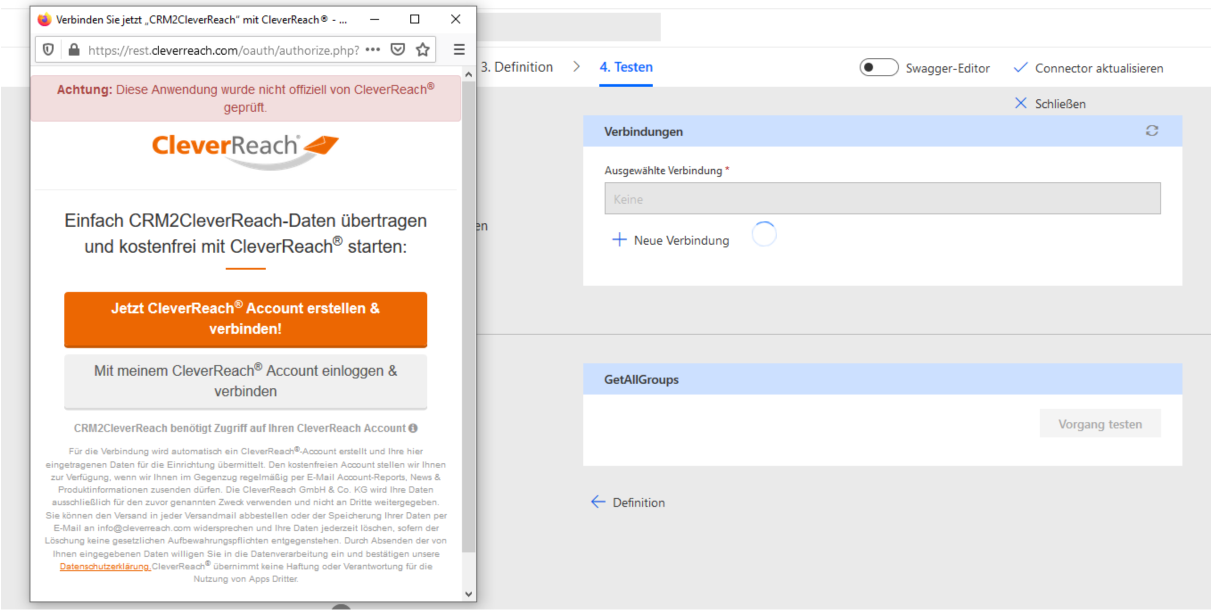
To do this, go to "Custom Connectors" under "Data" in Microsoft Power Automate and click on the pen for editing at the "CleverReach" connector.



Under the section "Security" the authentication data is then entered in the respective field.



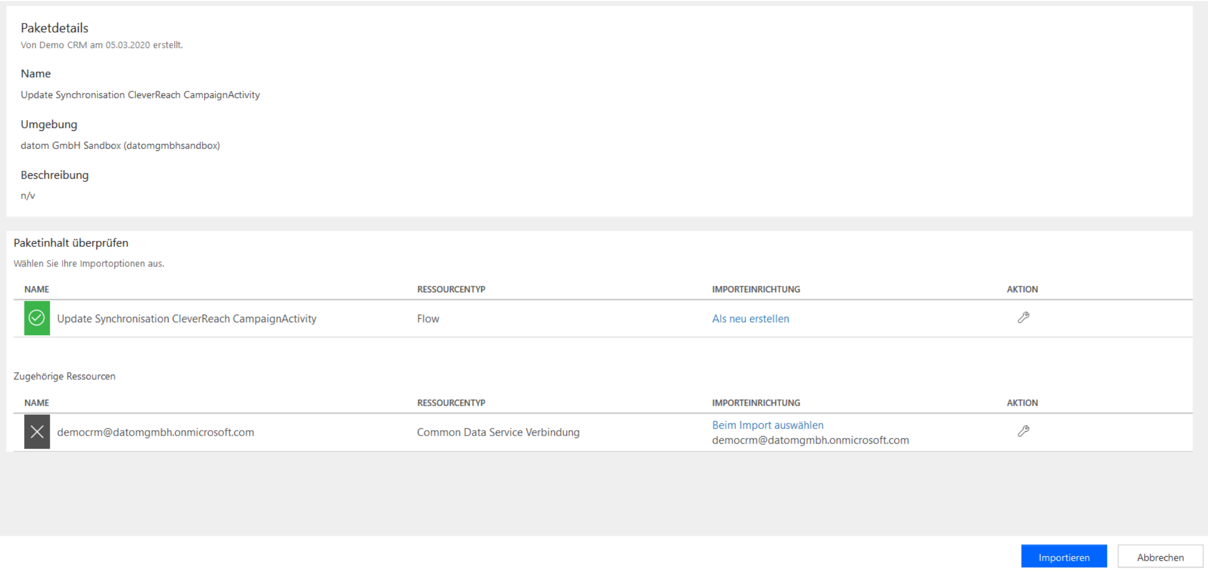
Under the section "Test" you have to create a new connection.



10.2 Installation of the flows

The flows have to be imported on the page "flow.microsoft.com" for your own flows.

To do this, go to the tab "My Flows" in the menu bar and click on "Import" and upload the .zip file of the respective flow. Then select "Create as new" at the import option and choose the connection to the Common Data Service at the corresponding resources or create a new connection via the button "Create new".



After clicking on the "Import" button, the flow is added to your own flows and can now be started from the CRM.

10.3 Update synchronization CleverReach

The "Update Synchronization CleverReach" flow is used if the transfer or update from the CRM to CleverReach failed.

Through the flow, independent of a trigger in a field, the entire data record is transferred from the CRM to CleverReach and the recipient list there is completely updated.

The flow is available in three versions: for the marketing lists, the campaigns and the campaign activities. In the data set used, you can start the flow manually by clicking on the three items in the menu and then selecting the respective flow under the "Flow" menu.

The flow "CleverReachToCrm" is included in the solution "datom_CleverReachInterface" and therefore does not need to be added to the own flows.

10.4 CleverReachToCrm

The "CleverReachToCrm" flow is automatically executed once per hour.

For all synchronized marketing lists, campaigns and campaign activities, the respective recipient events and campaign reactions are read from the recipient list in CleverReach and then displayed in the field "Recipient status from CleverReach".

10.5 Create ReceiverState

When a new receiver state is created, the "Create ReceiverState" flow starts and updates the checklist of the corresponding lead or contact with the data from CleverReach.

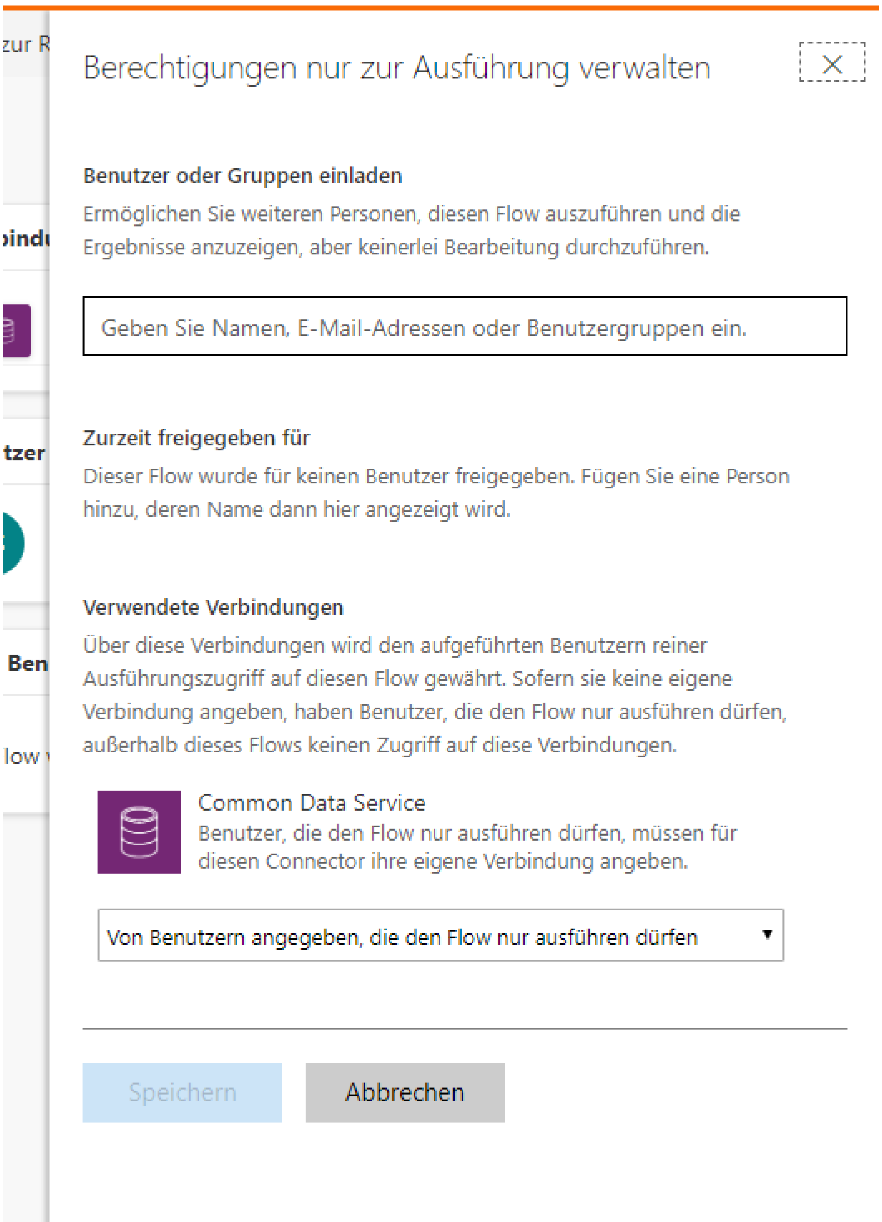
10.6 Update ReceiverState

W When a new receiver status is created, the "Update ReceiverState" flow starts and updates the checklist of the corresponding lead or contact with the data from CleverReach.

10.7 Sharing Flows with Other Users

In order for the flows to be started by other users from the CRM, they must be released for the respective users. To release a flow to another user, click on the "Edit" button in the "Execute user only" field in the flow overview. Here the flow can then be released for the desired persons or groups.

The flows "Create ReceiverState", "Update ReceiverState", "CleverReachToLead" and "CleverReachToCrm" run globally for the whole system and do not have to be released for each user. Only the three "Update Synchronization" flows have to be released for each user individually in order to run.



Users can only execute the flow, but cannot make any changes to it.

11 Troubleshooting

If something is not transferred or updated during the automated transfer from CRM to CleverReach, the "Update Synchronization" flow must be executed.