



CloudCherry – Dynamics CRM Integration User Manual

v 1.0

21-08-2019

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1. About CloudCherry

CloudCherry is a Real-time, Omni-channel End-To-End Customer Experience Management platform that lets brands track, measure & improve Customer Delight - thereby increasing profitability, reducing customer churn and improving loyalty.

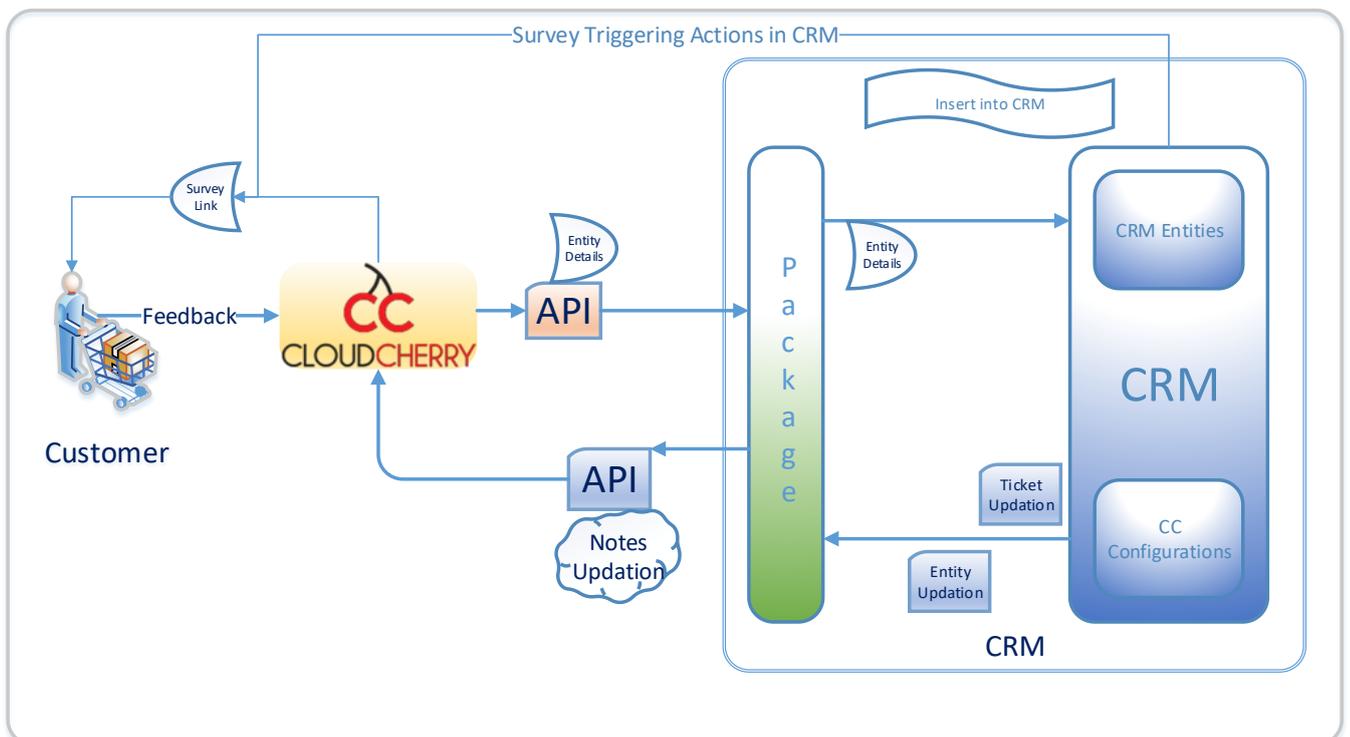
The SaaS product is the perfect tool for Feedback collection, Customer Experience Management and Customer Experience Measurement for SMBs and enterprises.

One of the key aspects to improving Customer Experience is closing the Loop with Customers when they face an issue. Through the integration between Dynamics ticketing module and CloudCherry, every customer issue provided in the form of feedback can be automatically raised as a ticket in Salesforce and can be tracked, managed and closed effectively.

The app handles the following:

- Set up notifications in CloudCherry and Create and maintain the relation with Dynamics
- Update data on your CloudCherry (CEM) platform whenever any action is taken

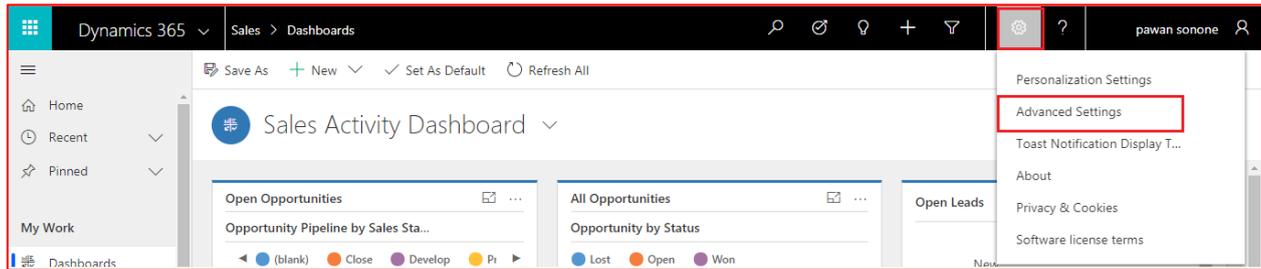
2. Workflow



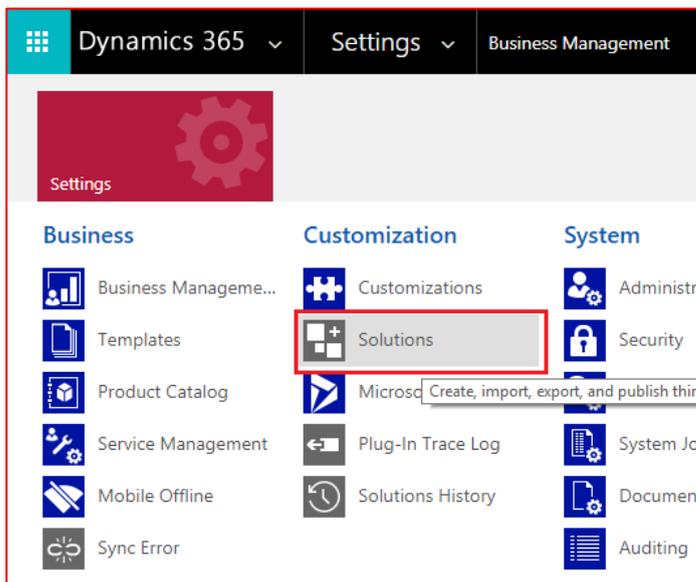
3. CRM Flow

3.1 Setting up configuration for the first time:

3.1.1 Once user login to CRM, go to “Advanced Settings”.



3.1.2 Navigate to “Solution” from site map



3.1.3 Open “Cloudcherry” solution from the list of solutions

Name	Display Name	Version	Installed On	Package T...	Publisher	Description
microsoftportalbase	Dynamics 365 Portals ...	9.1.1.2	19-07-2019	Managed	Microsoft	This solution contains Portal base components...
msdynce_PortalPrivac...	Portal Privacy Extensio...	9.1.7.2	19-07-2019	Managed	Dynamics 365	Extends portal capabilities by providing addition...
MicrosoftPortalDepen...	Dynamics 365 Portals ...	9.1.4.0	19-07-2019	Managed	Microsoft	This solution contains Portal dependency solutio...
DataExportService	Data Export Service fo...	1.0.0.0	19-07-2019	Managed	Microsoft Dynamics 365	Data export service provides the ability for custo...
CloudCherry_Unmana...	CloudCherry_Unmana...	1.0.0.0	14-07-2019	Unmanag...	Cloud Cherry	
<input checked="" type="checkbox"/>	CloudCherry	Cloud Cherry	1.0.0.4	14-07-2019	Managed	Cloud Cherry
ResourceSchedulingD...	Field Service Demo Da...	1.2.0.1	01-07-2019	Managed	Dynamics 365	Demo Data for Field Service
ProjectServiceDemoD...	Fabrikam Manufacturi...	3.0.0.3	01-07-2019	Managed	Dynamics 365	Field and Project Service Demo Data Package

3.1.4 This will open the configuration page, where user must enter valid CloudCherry credentials.

Solution Cloud Cherry

CloudCherry Credentials

CloudCherry Username:

CloudCherry Password:

CloudCherry SSO Key:

CloudCherry Base Url:

3.1.5 Enter valid Cloudcherry credentials and save the details by clicking on “SAVE DETAILS” button.

CloudCherry Credentials

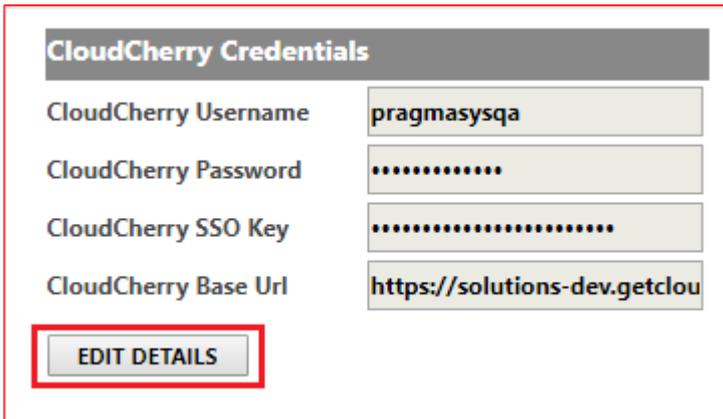
CloudCherry Username:

CloudCherry Password:

CloudCherry SSO Key:

CloudCherry Base Url:

3.1.6 Also, you can edit the credentials by clicking on “EDIT DETAILS” button.

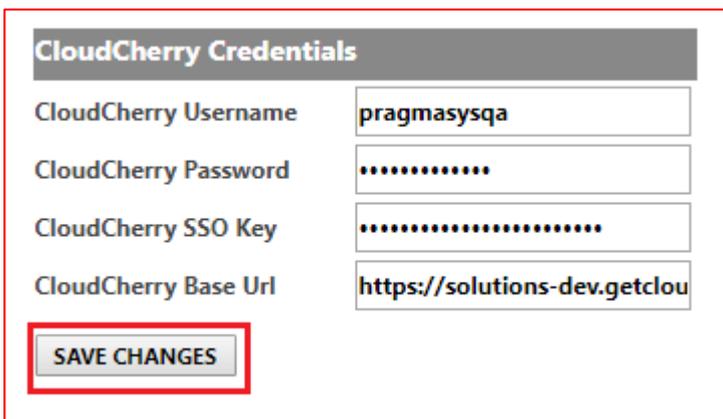


CloudCherry Credentials

CloudCherry Username	pragmasysqa
CloudCherry Password
CloudCherry SSO Key
CloudCherry Base Url	https://solutions-dev.getclou

EDIT DETAILS

3.1.7 Once the changes are done, click on “SAVE CHANGES” button to save the current changes.



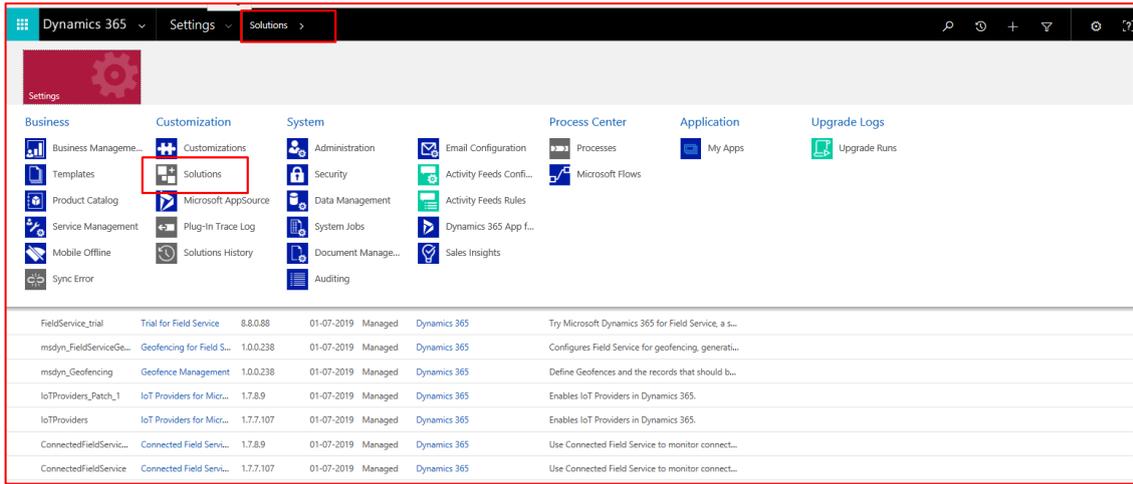
CloudCherry Credentials

CloudCherry Username	pragmasysqa
CloudCherry Password
CloudCherry SSO Key
CloudCherry Base Url	https://solutions-dev.getclou

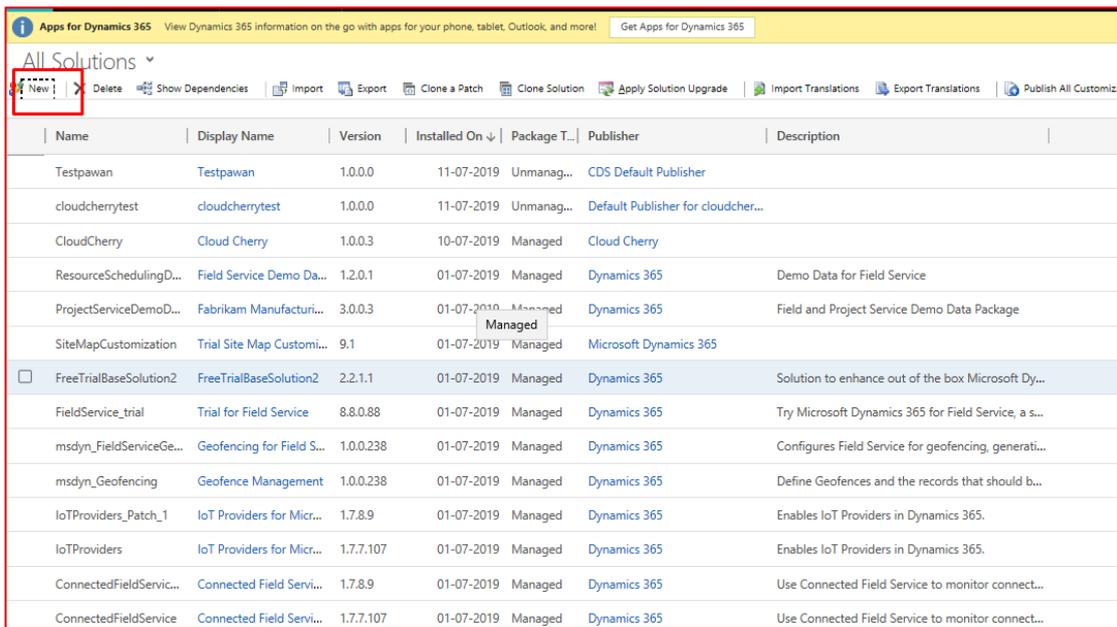
SAVE CHANGES

3.2 Create Unmanaged solution:

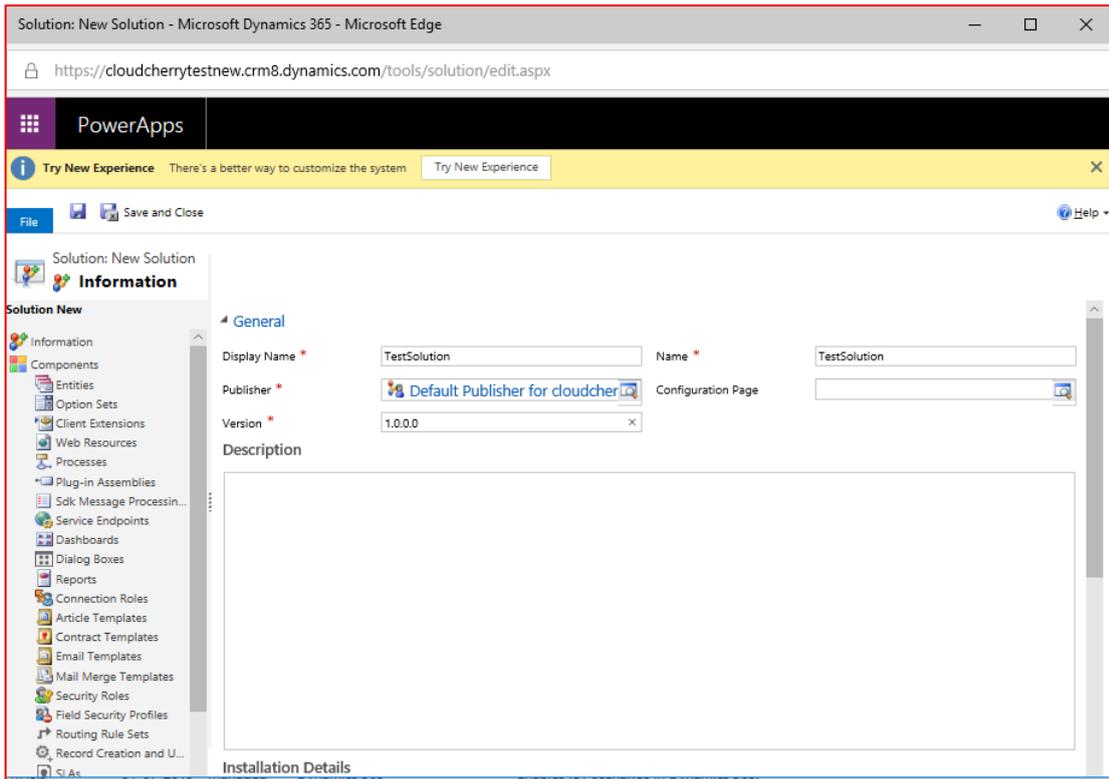
3.2.1 Expand the site map and click on Setting -> Solution.



3.2.2 Click on “New” Button to create new Unmanaged solution in which user will add the custom workflows.

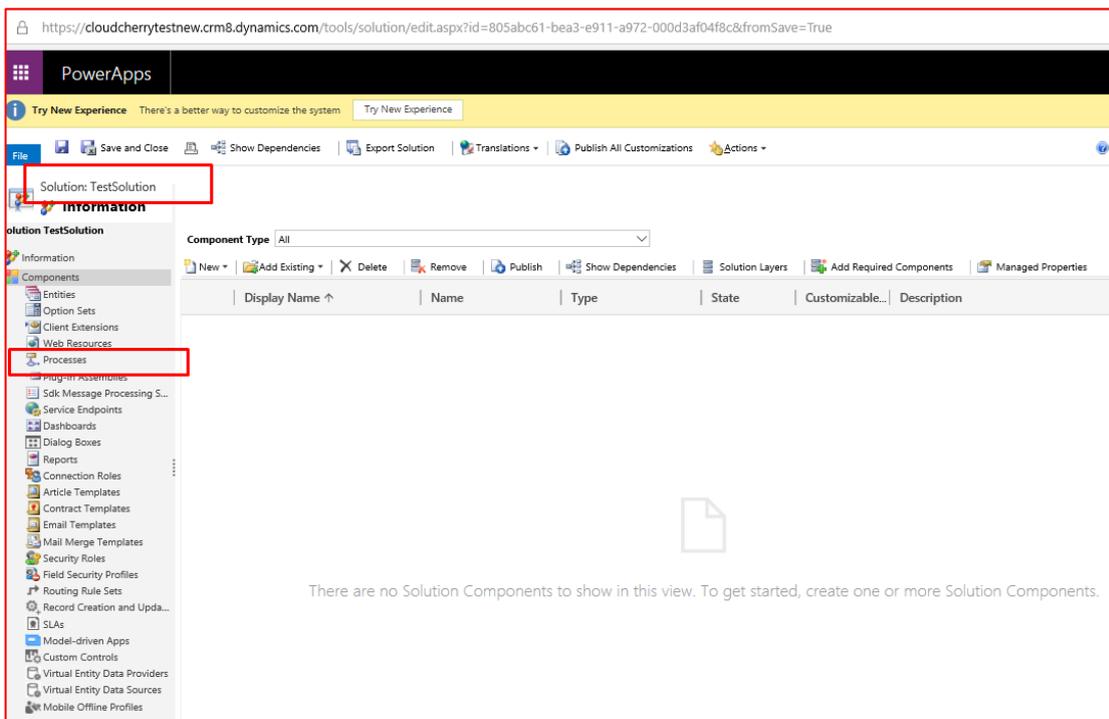


3.2.3 Enter all mandatory fields as per below screenshot and save the solution.

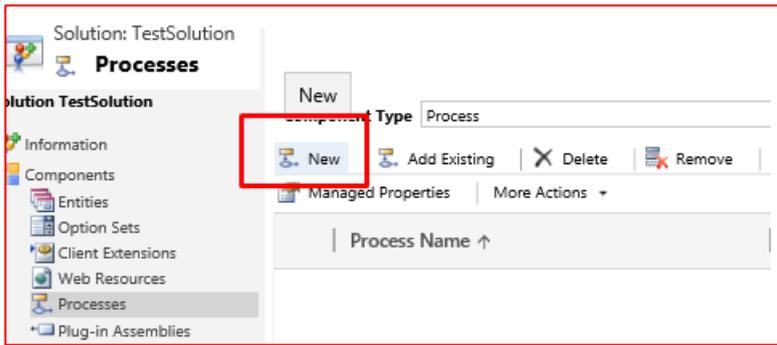


3.3 Setting the Process (workflow) for Reopen Case:

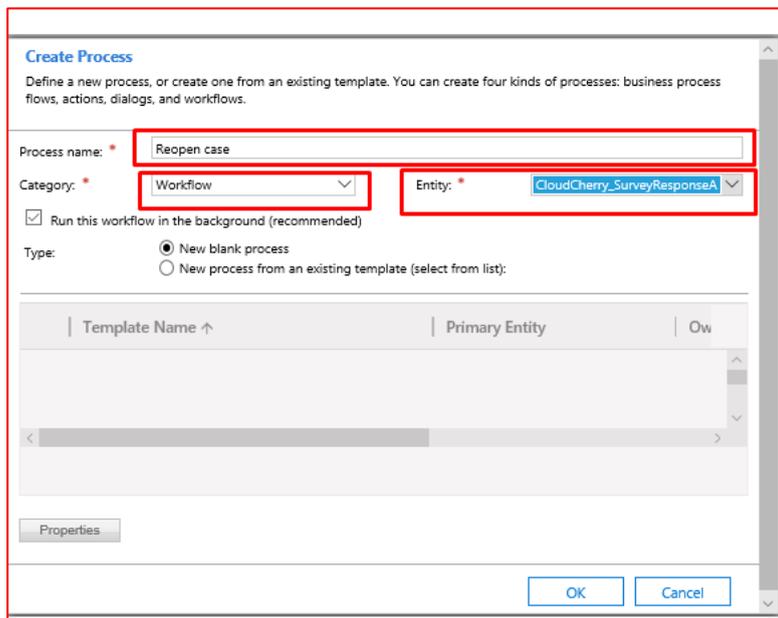
3.3.1 Open saved solution and click on Processes.



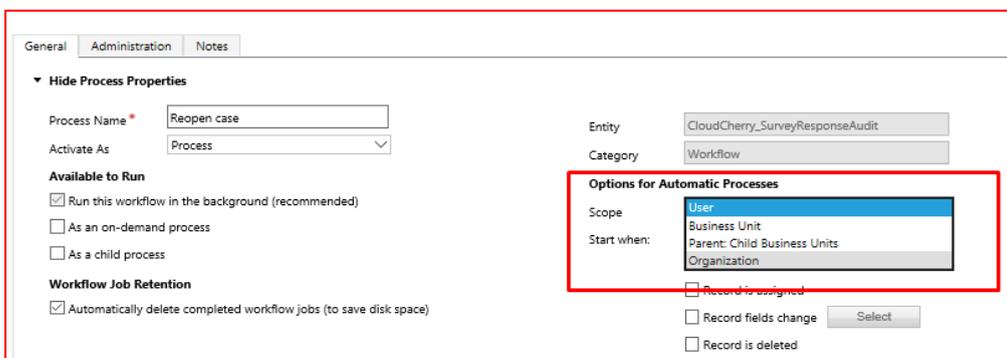
3.3.2 After clicking on processes, click on “New” Button to create new process.



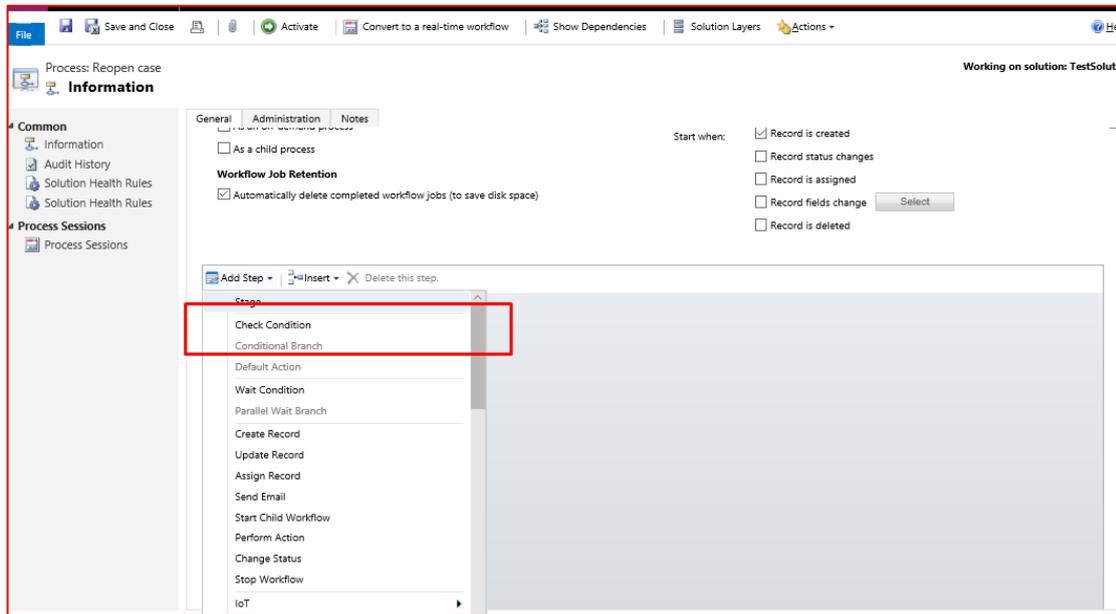
3.3.3 Enter Process name, Category, Entity and click “OK” button.



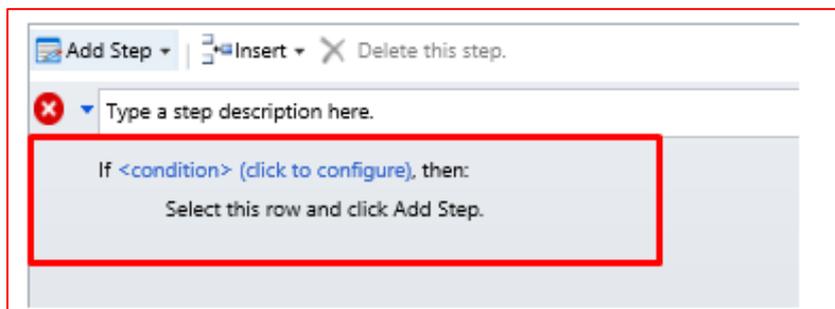
3.3.4 User must select “Organization” from drop down of Scope.



3.3.5 From 'Add Step' drop down select "Check Condition" option.

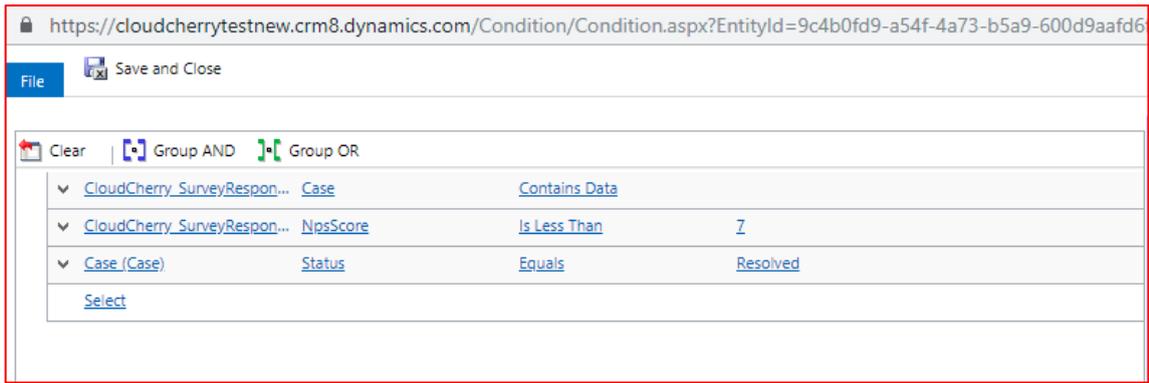


3.3.6 Click on the "condition" to enter the required condition.

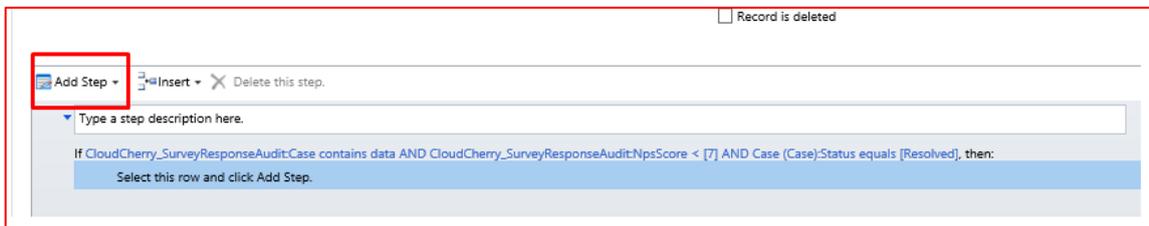


3.3.7 Add details as per given screenshot and click on 'Save and Close' button to save the details.

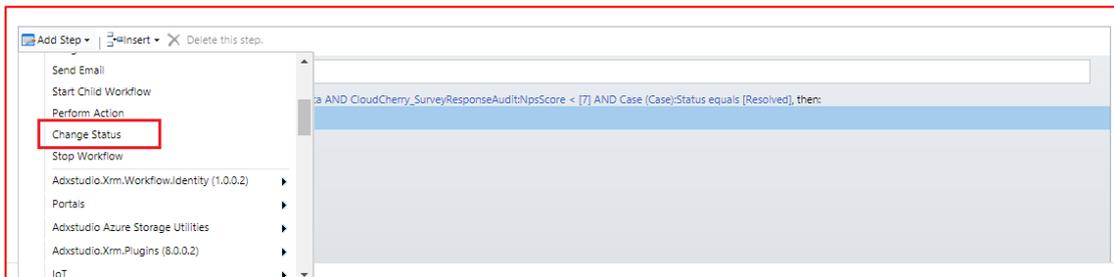
Note: This is an example to add the conditions. User can add conditions as per their requirement.



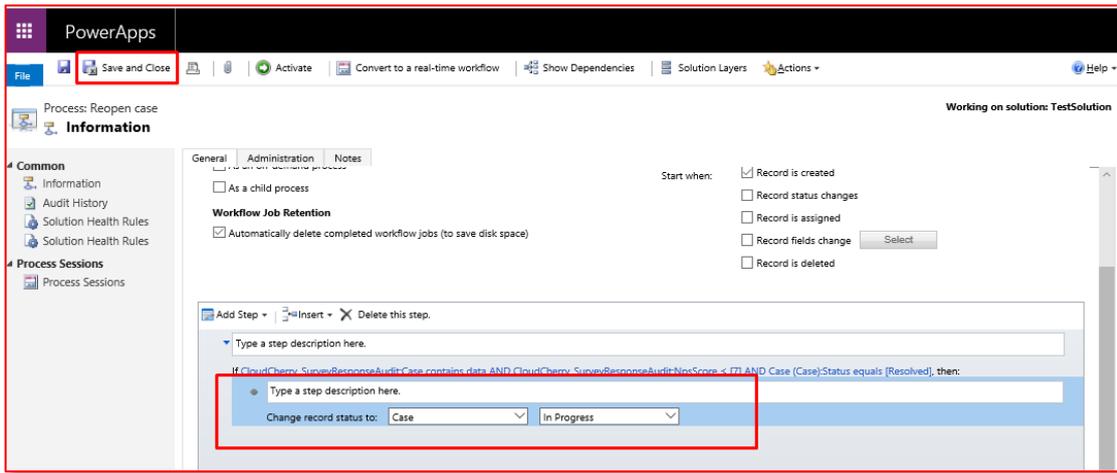
3.3.8 After adding details, click on “Add step” button.



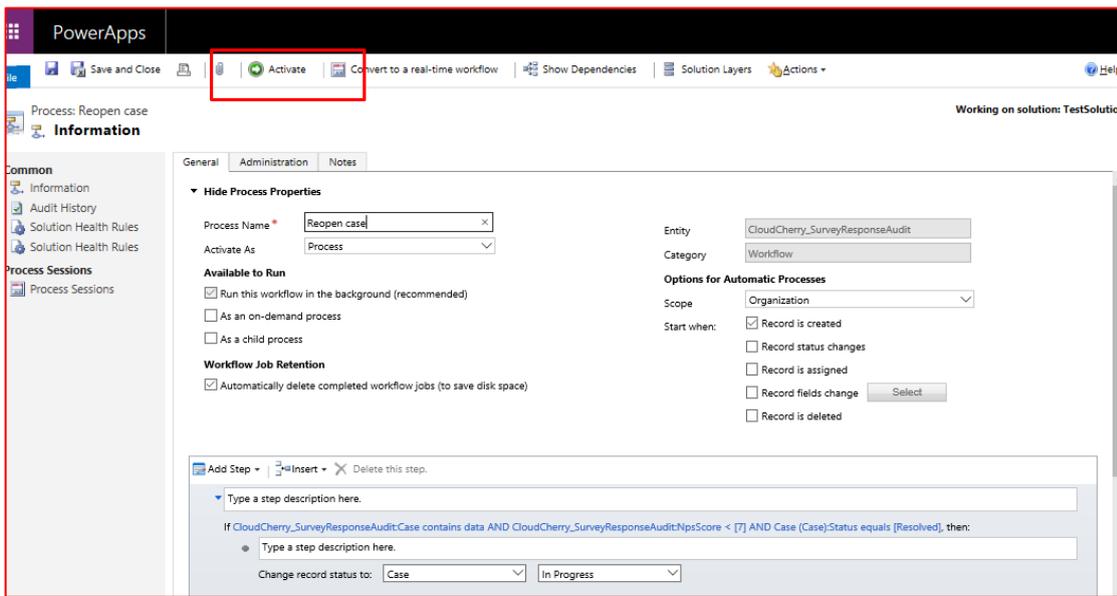
3.3.9 Add next step by clicking on “Change Status” as per given in screenshot.



3.3.10 Select Change record status as ‘In Progress’ and click on save and closed.

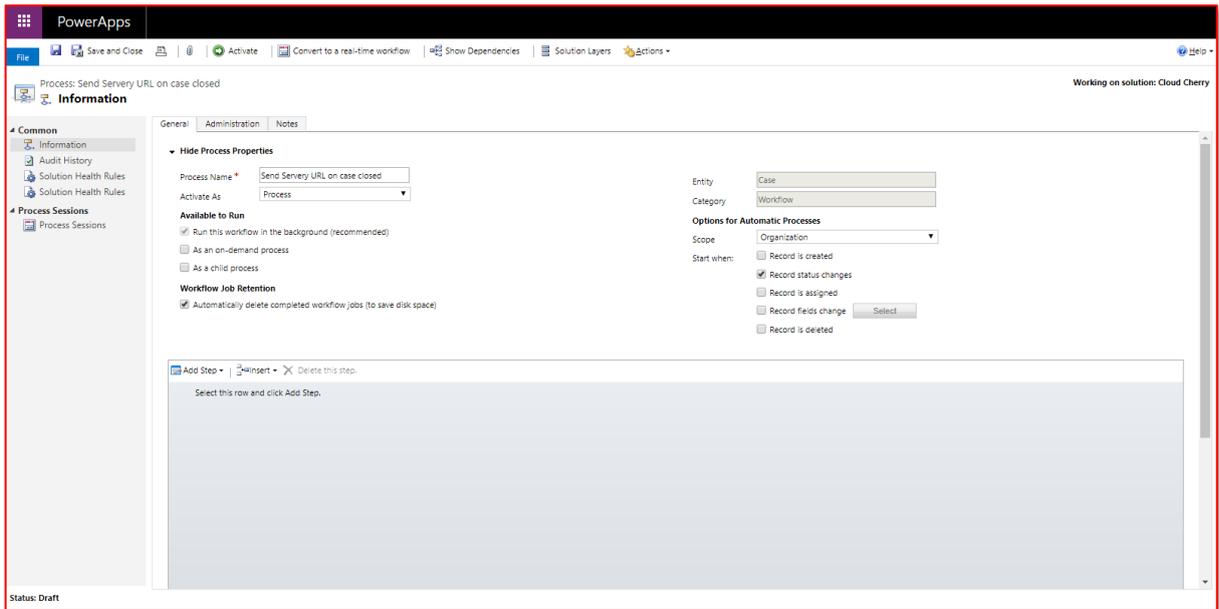


3.3.11 Click on 'Activate' button to activate the workflow.

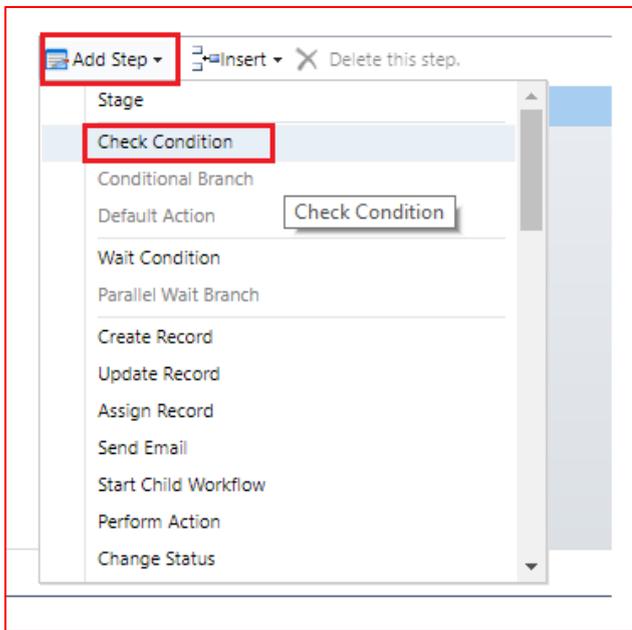


3.4 Send Survey URL in an Email:

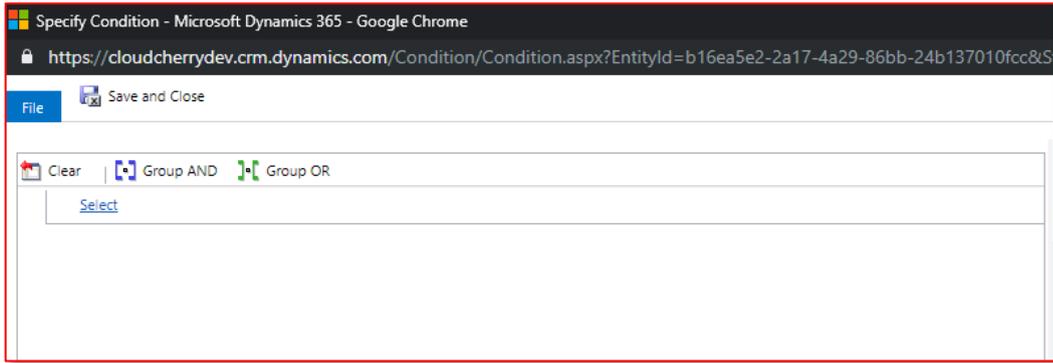
3.4.1 Create New workflow on case entity



3.4.2 From “Add Step” drop down select “Check Condition” option

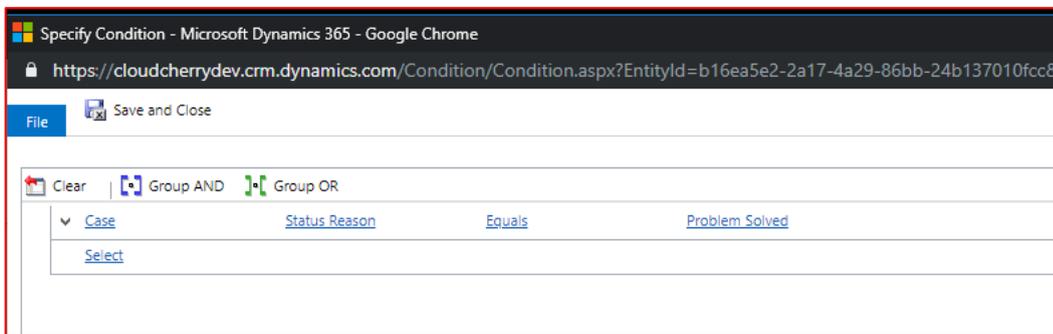


3.4.3 Click on the “Condition” to enter the required condition

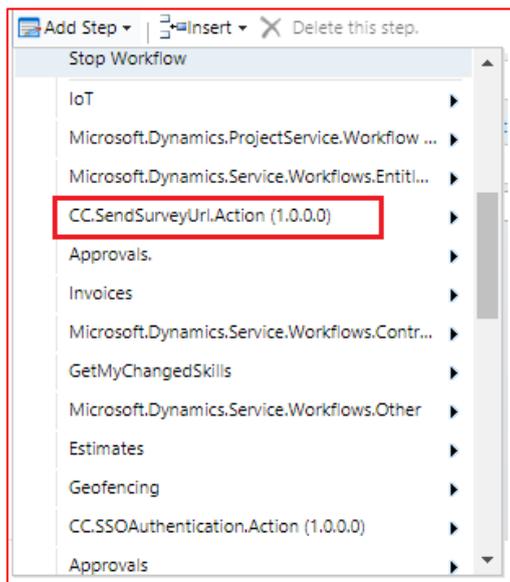


3.4.4 Set the condition as per given in below screenshot

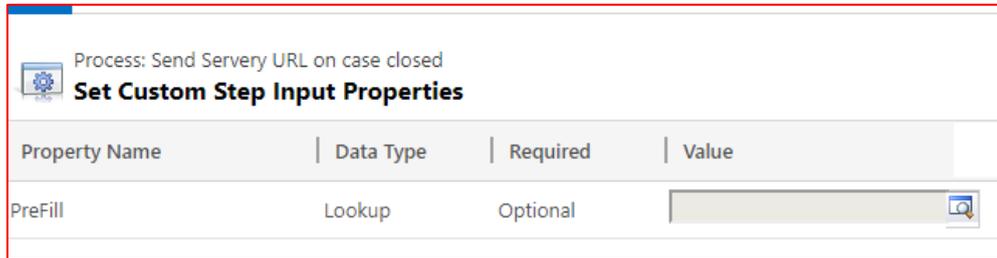
Note: This is an example to add the conditions. User can add conditions as per their requirement.



Select the Action from drop down.



3.4.5 Proceed to set properties for that Action

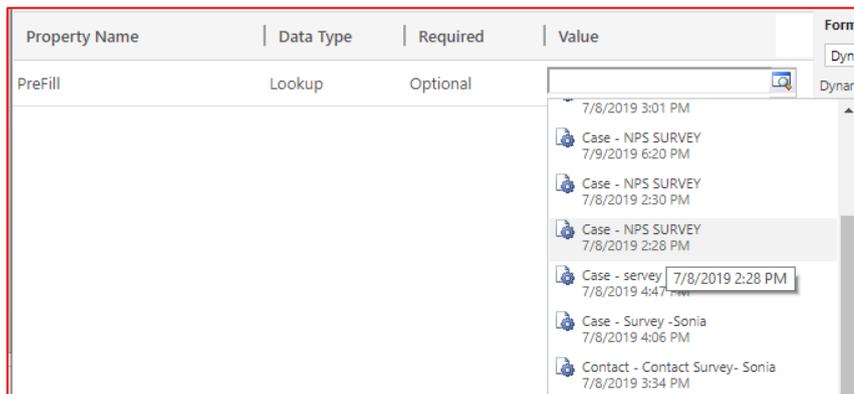


Process: Send Servery URL on case closed

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
PreFill	Lookup	Optional	<input type="text"/>

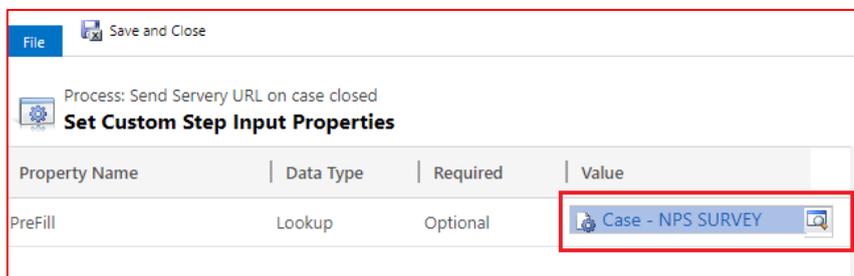
3.4.6 Select the Prefill mapping from dropdown



Property Name	Data Type	Required	Value	Form
PreFill	Lookup	Optional	<input type="text"/>	Dyna

- 7/8/2019 3:01 PM
- Case - NPS SURVEY
7/9/2019 6:20 PM
- Case - NPS SURVEY
7/8/2019 2:30 PM
- Case - NPS SURVEY
7/8/2019 2:28 PM
- Case - servey | 7/8/2019 2:28 PM
7/8/2019 4:47 PM
- Case - Survey -Sonia
7/8/2019 4:06 PM
- Contact - Contact Survey- Sonia
7/8/2019 3:34 PM

3.4.7 Save and Close the prefill action



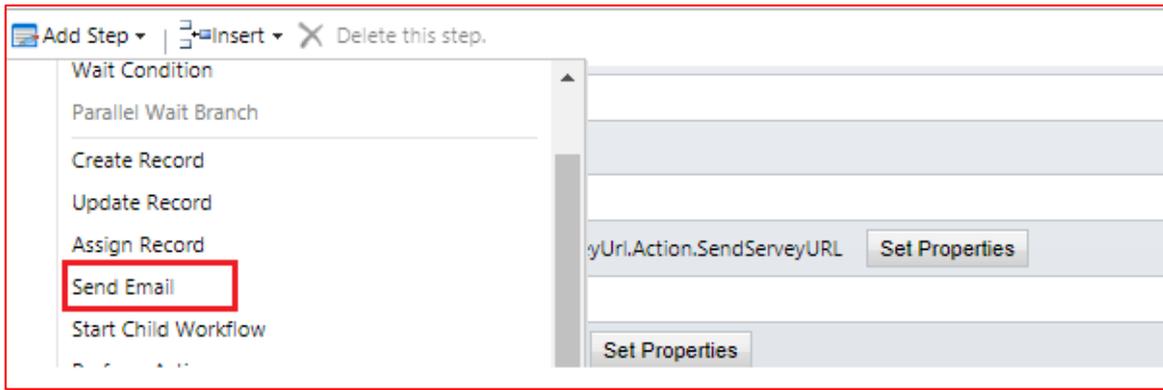
File Save and Close

Process: Send Servery URL on case closed

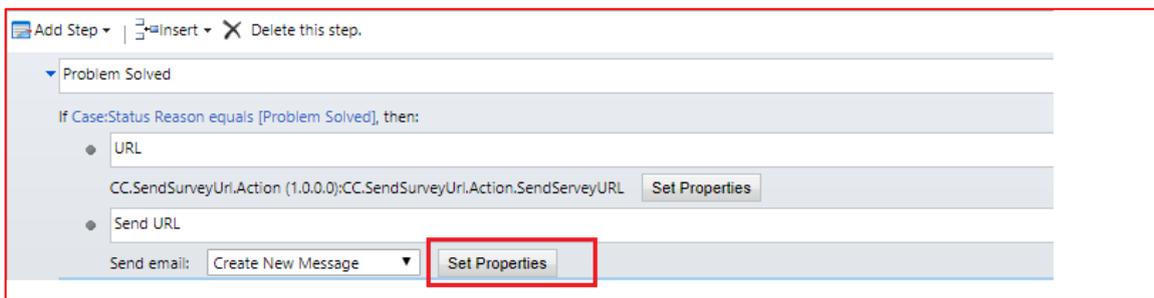
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
PreFill	Lookup	Optional	Case - NPS SURVEY

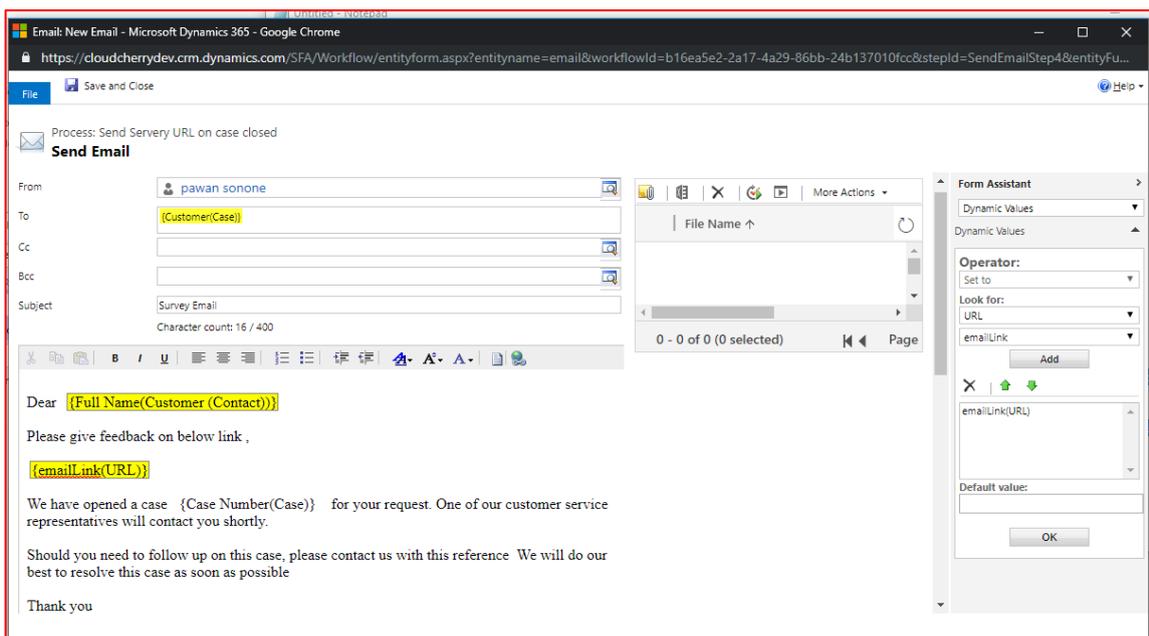
3.4.8 Add next step to send an Email. Select "Send Email" from dropdown.



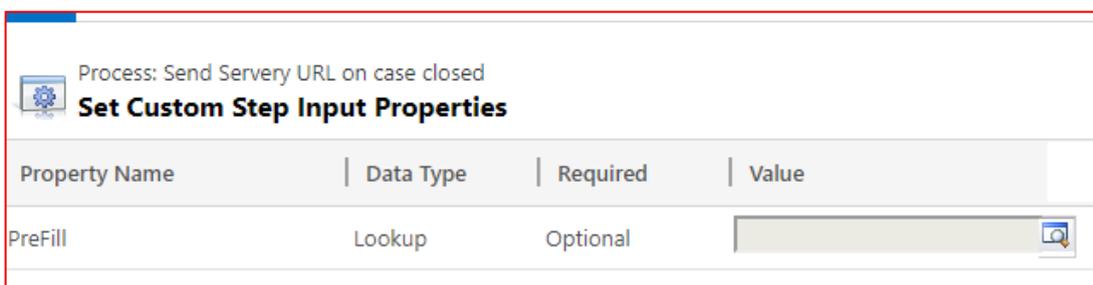
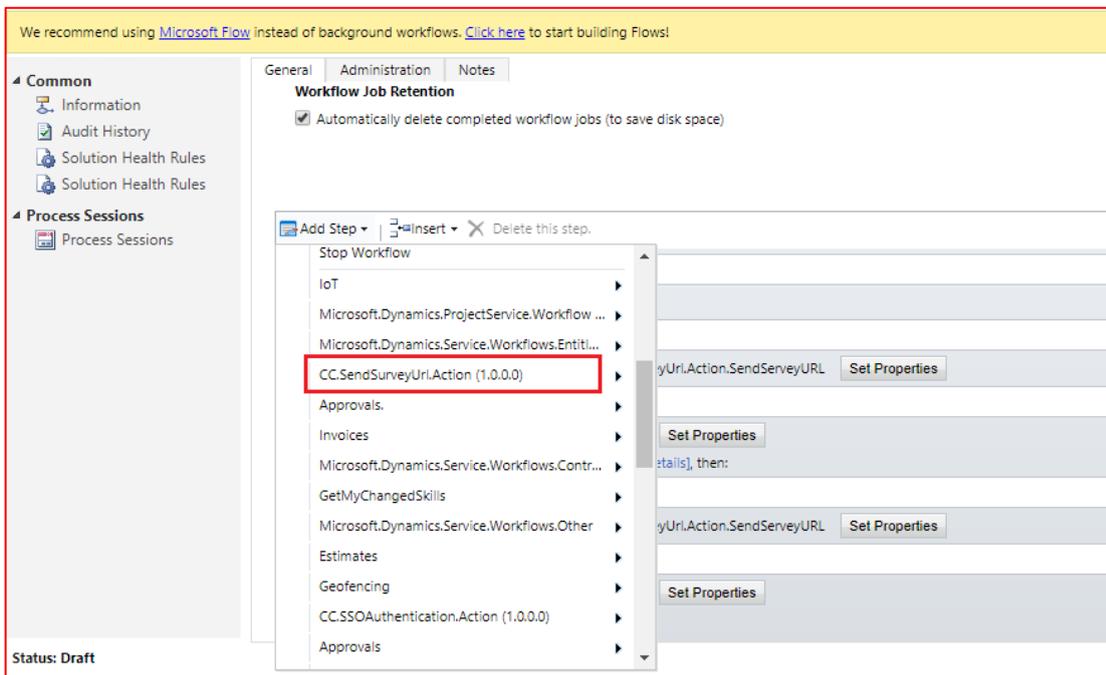
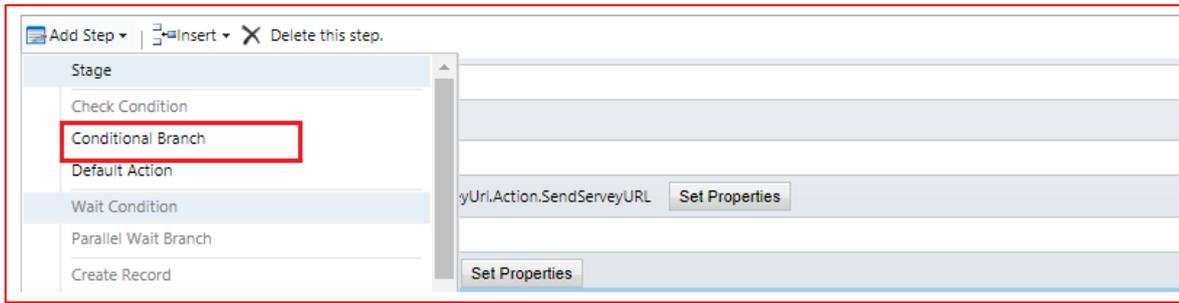
3.4.9 Click on “Set Properties” button



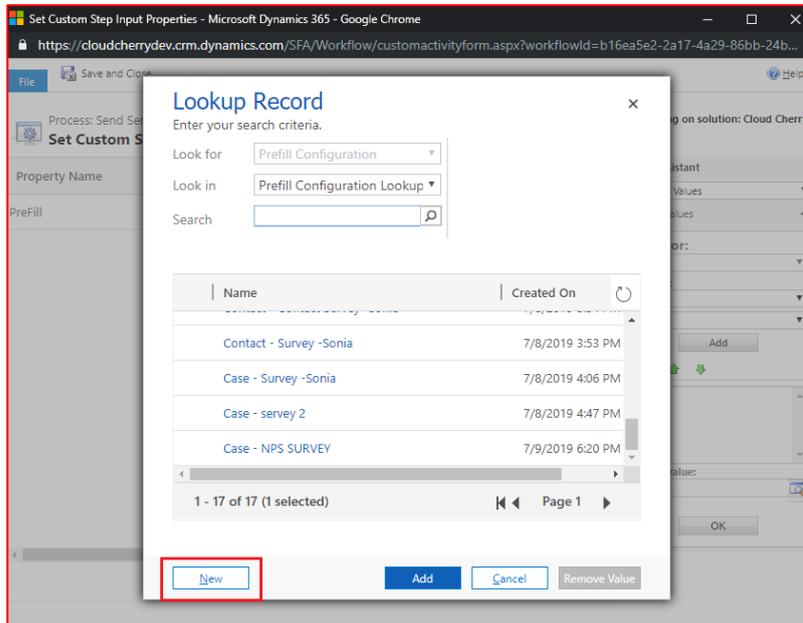
3.4.10 Fill the details in the mail and assign the survey link



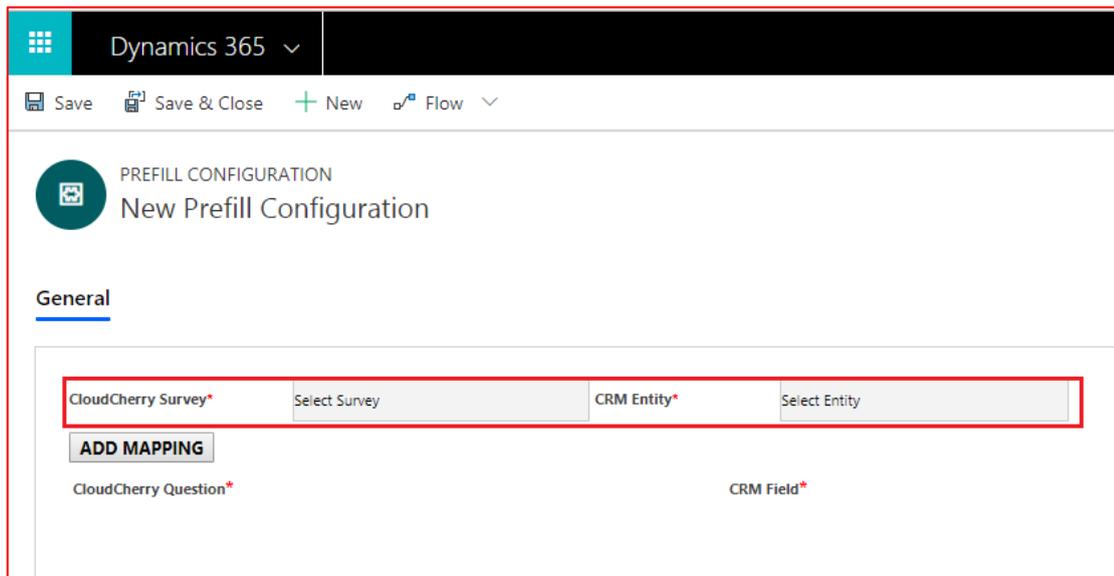
3.4.11 Add branching condition for other survey to be triggered on different condition



3.4.12 If the Prefill mapping does not exist in the lookup, then user can create new survey by following the below steps. Click on “New” button.



3.4.13 Select the “CloudCherry Survey” and “CRM Entity” value from drop down



Save Save & Close + New Flow

PREFILL CONFIGURATION
New Prefill Configuration

General

CloudCherry Survey* CRM Entity*

ADD MAPPING

CloudCherry Question* CRM Field*

3.4.14 Map the CloudCherry Question with CRM fields

General

CloudCherry Survey* CRM Entity*

ADD MAPPING **SAVE CHANGES**

CloudCherry Question*	CRM Field*	
<input type="text" value="Incident Id"/>	<input type="text" value="Case"/>	
<input type="text" value="User Id"/>	<input type="text" value="Owner"/>	
<input type="text" value="Contact Id"/>	<input type="text" value="Contact id"/>	

3.4.15 User must map Incident Id to Case. This is mandatory to map.

General

CloudCherry Survey* CRM Entity*

ADD MAPPING **SAVE CHANGES**

CloudCherry Question*	CRM Field*	
<input type="text" value="Incident Id"/>	<input type="text" value="Case"/>	
<input type="text" value="User Id"/>	<input type="text" value="Owner"/>	
<input type="text" value="Contact Id"/>	<input type="text" value="Contact id"/>	

Note: If CRM Entity selected as Lead then map **LeadID** to **Lead** and if CRM entity selected as opportunity then set **OpportunityID** to **Opportunity**. This is mandatory to map.

CloudCherry Survey* Case Survey - Sonia CRM Entity* Lead

ADD MAPPING **SAVE CHANGES**

CloudCherry Question*	CRM Field*	
LeadID	Lead	
Please enter your mobile number	Mobile Phone	

CloudCherry Survey* Oppty survey- Sonia CRM Entity* Opportunity

ADD MAPPING **SAVE CHANGES**

CloudCherry Question*	CRM Field*	
OpptID	Opportunity	

3.4.16 Save the Mapping by clicking on “SAVE CHANGES” button

Dynamics 365 Case - Survey >> Case - Survey cloudcherrytestnew.crm8.dynamics.com says Record/s saved successfully **OK**

Save & Close + New Flow

PREFILL CONFIGURATION
Case - Survey

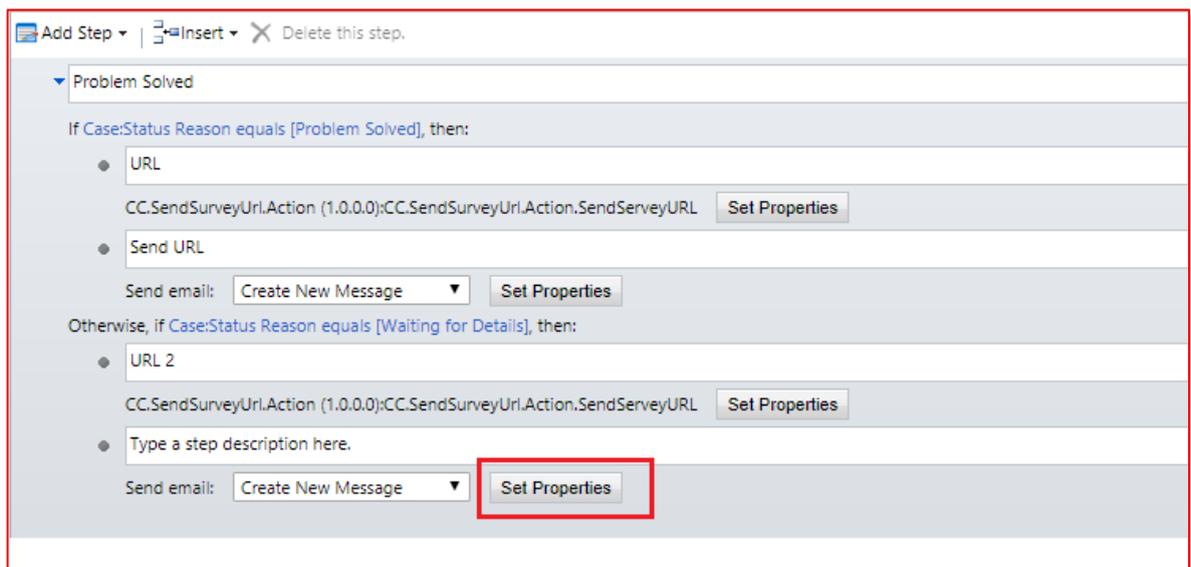
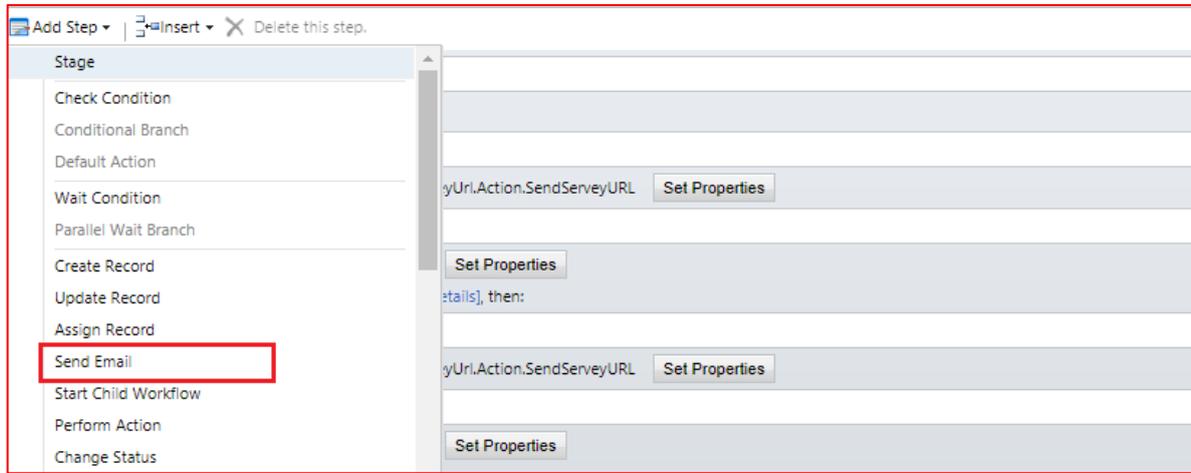
General Related

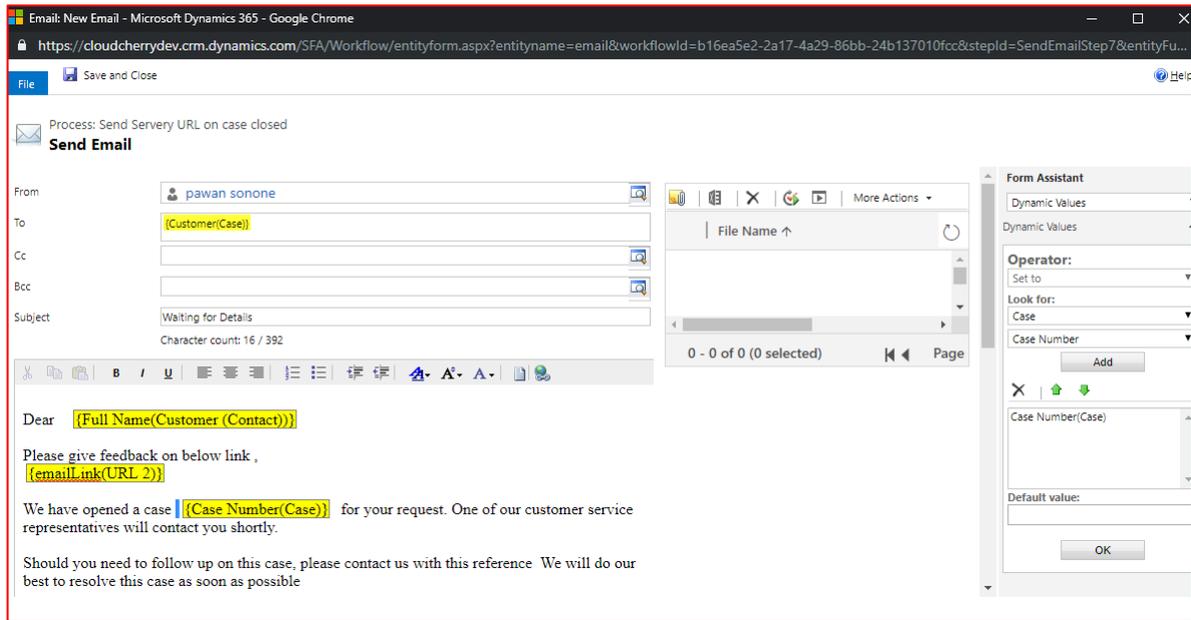
CloudCherry Survey* Survey CRM Entity* Case

ADD MAPPING **SAVE CHANGES**

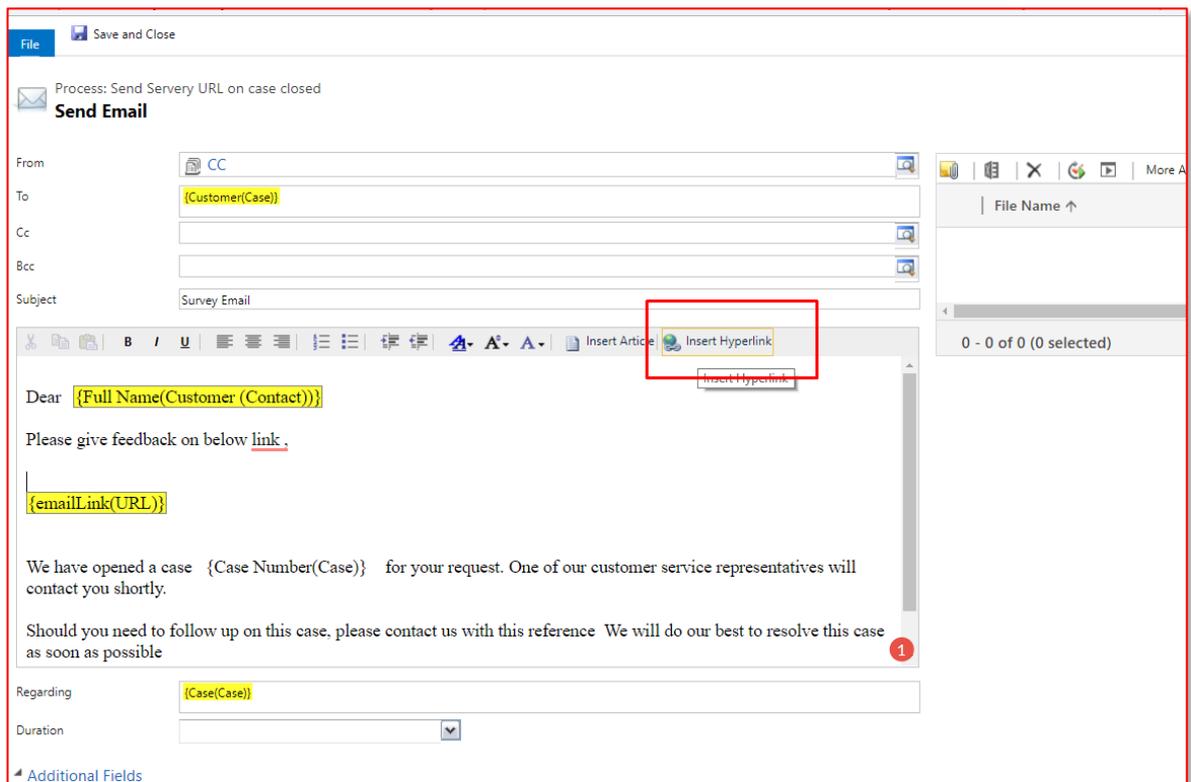
CloudCherry Question*	CRM Field*	
Incident Id	Case	
User Id	Owner	
Contact Id	Contact id	

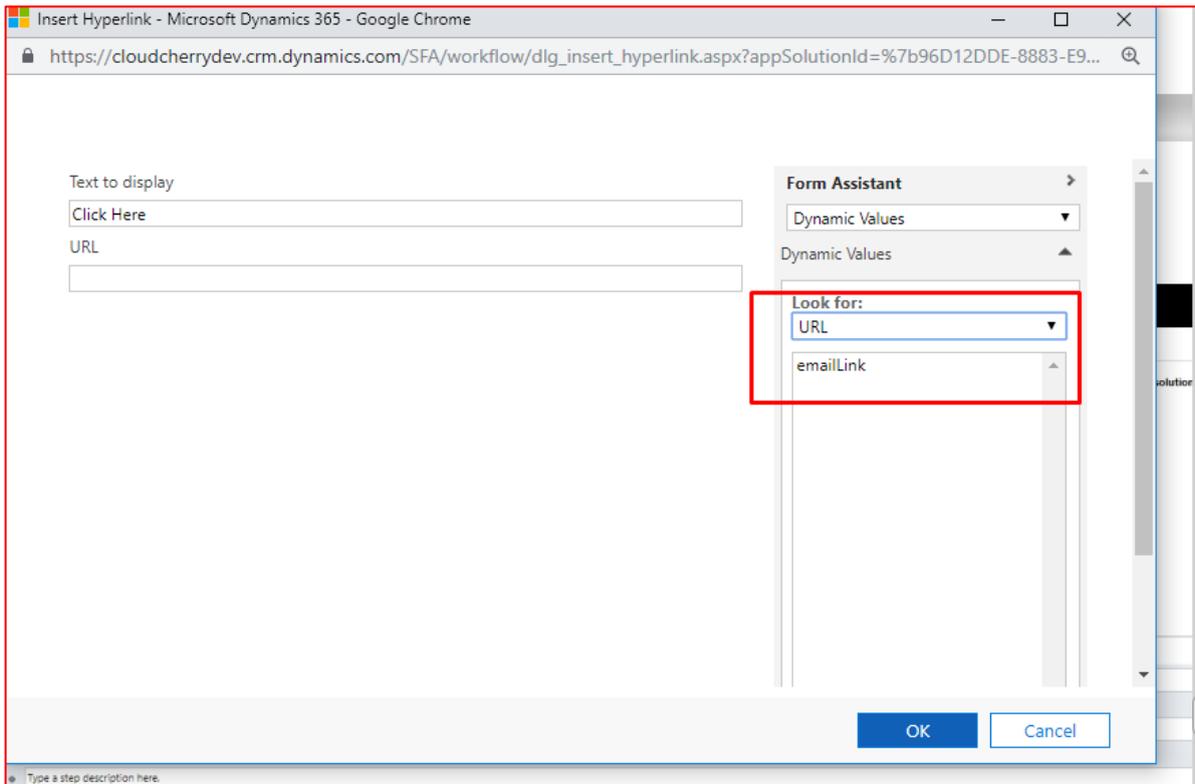
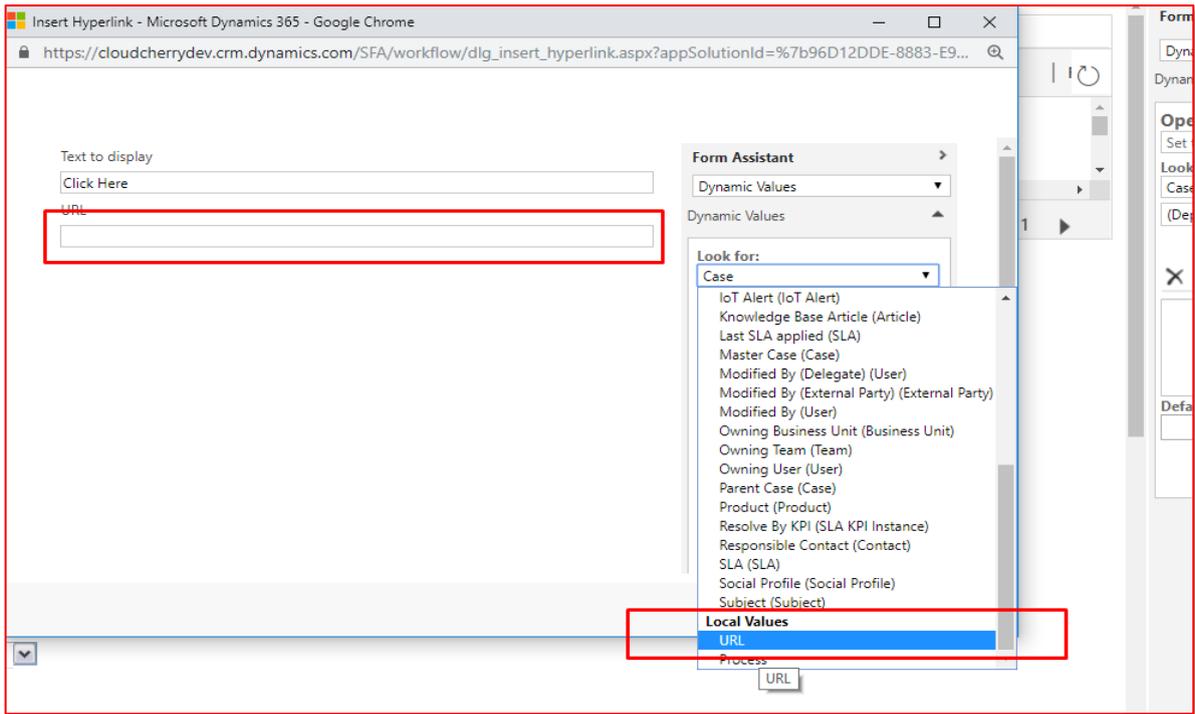
3.4.17 Select from the lookup record. Follow the same steps to add "Send Email".

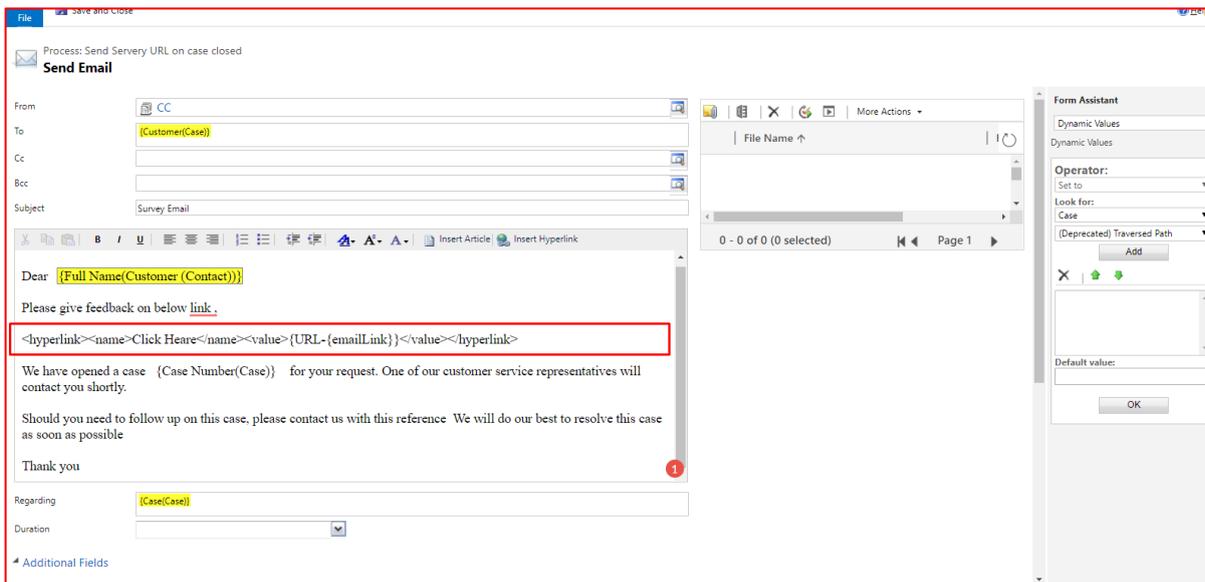
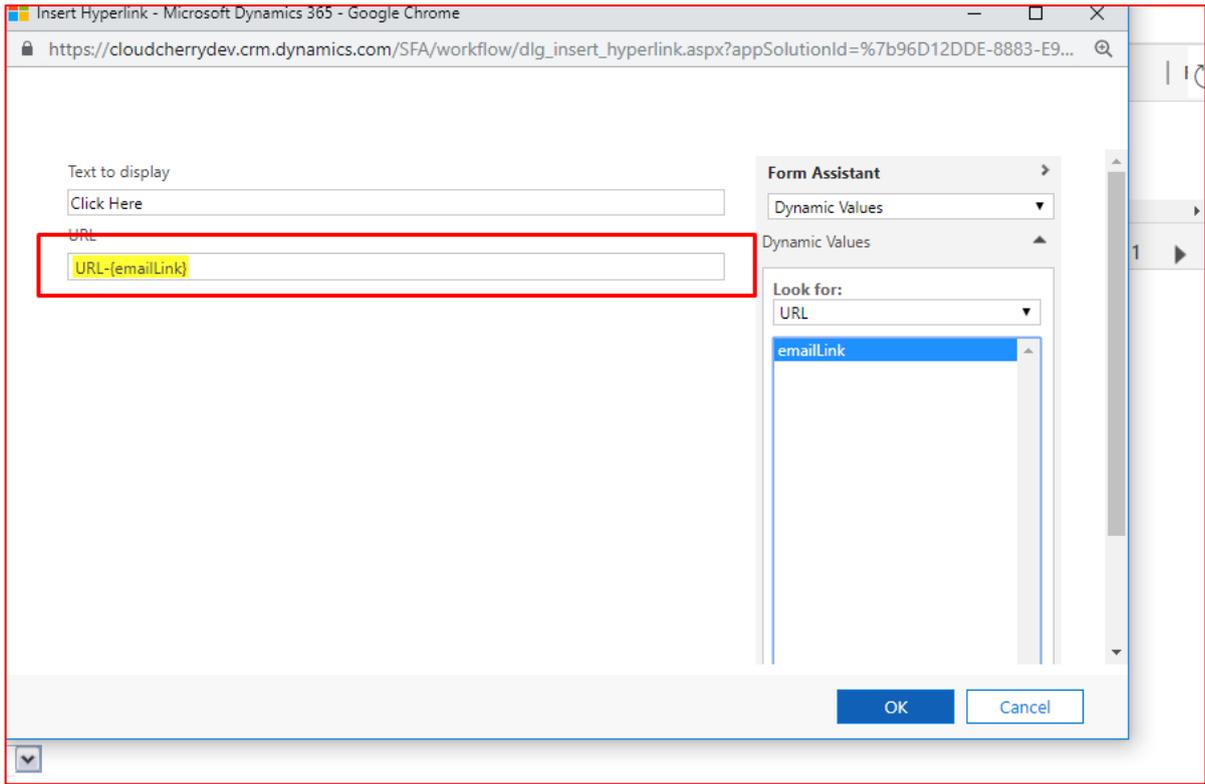


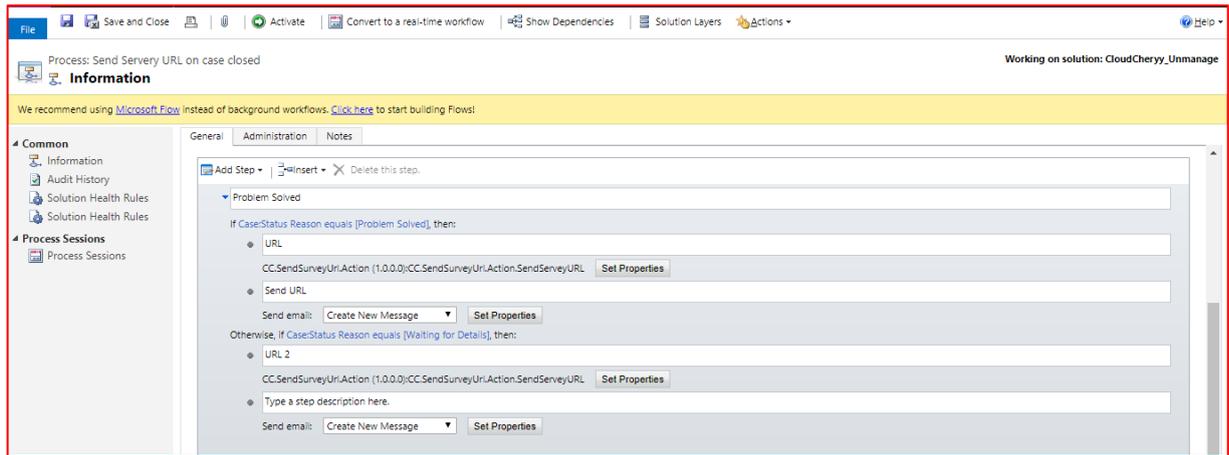


3.4.18 To hyperlink the URL, click on “Insert hyperlink” button.

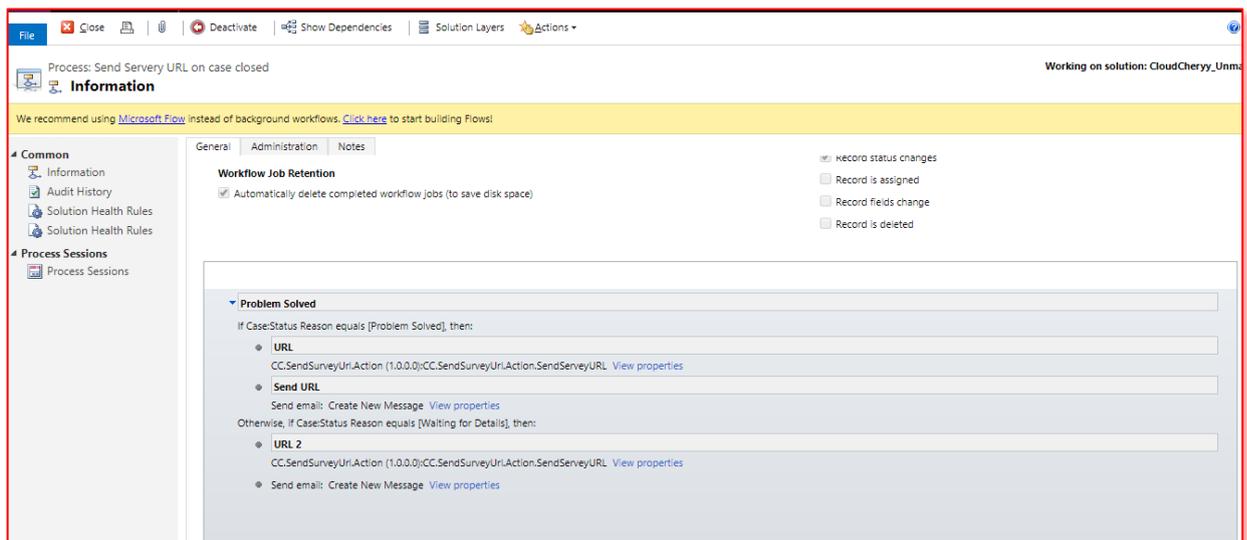








3.4.19 Click on “Activate” button to activate the workflow

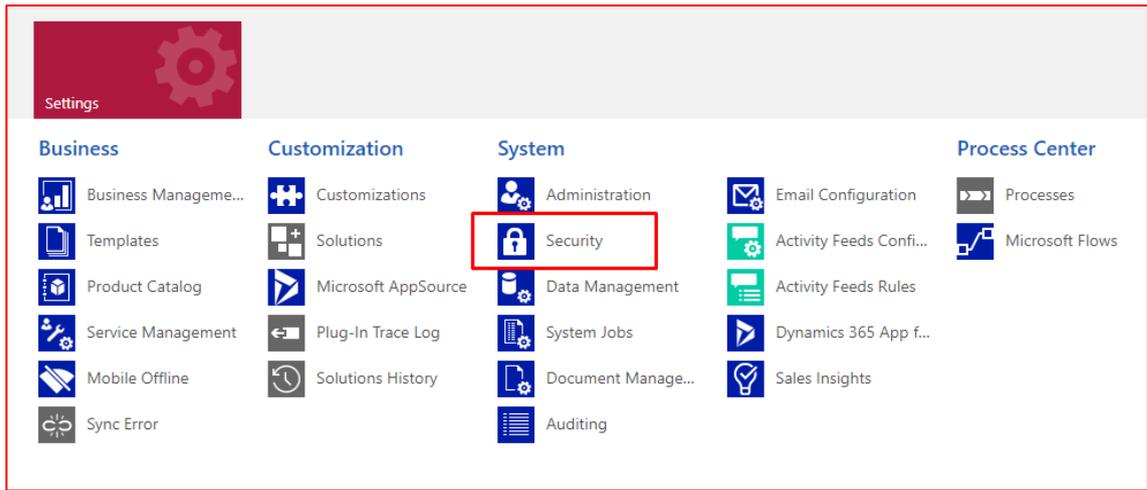


Note: To make any changes in workflow, user must deactivate the workflow. Make the require changes and again must activate the workflow.

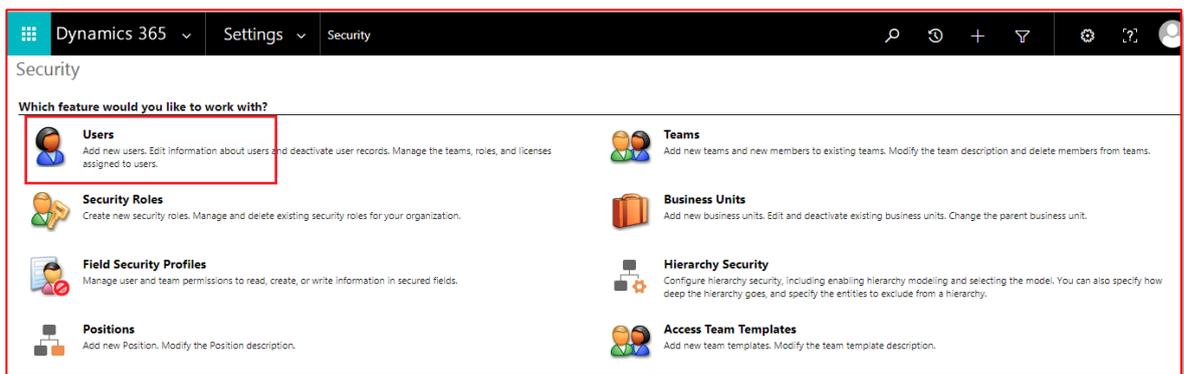
4. Security Role

4.1. Admin should give “CC_ConfigurationAccess” role for each user to access the customization done in managed solution. For the follow the below steps.

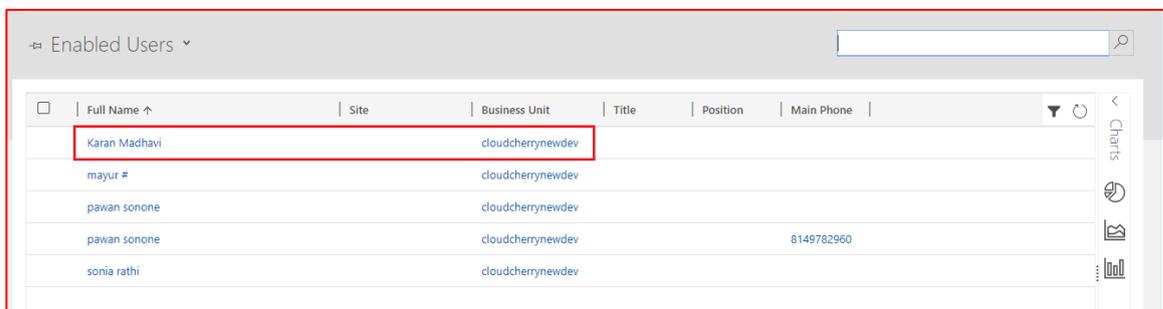
4.2. Go to Settings -> Security



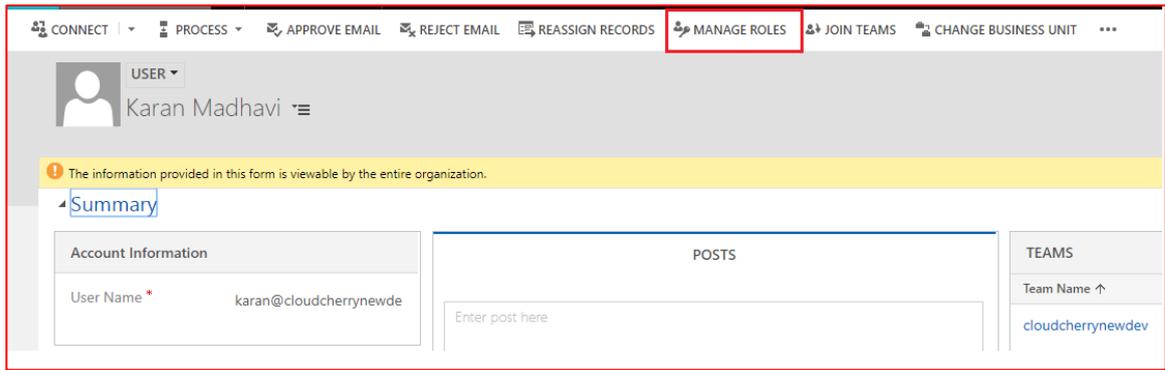
4.3. Select Users



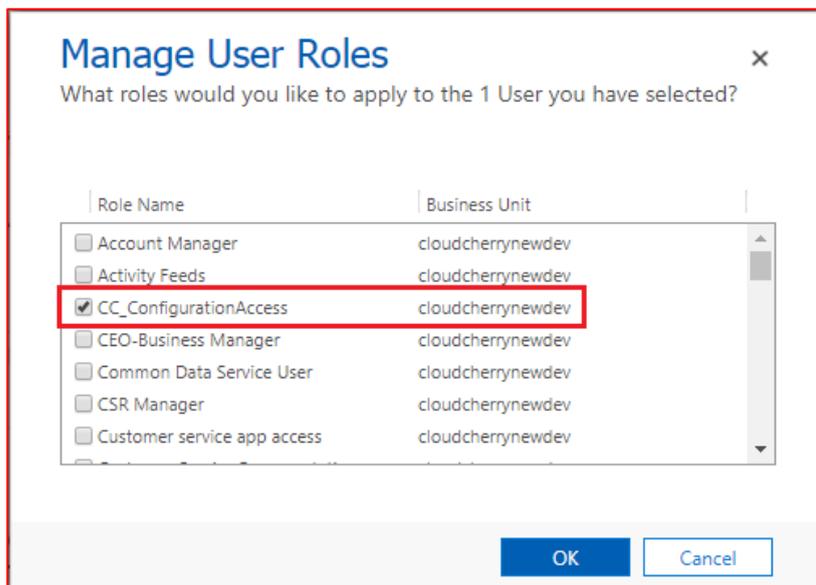
4.4. This will open the Enabled Users view. Select the user to which admin needs to give the access.



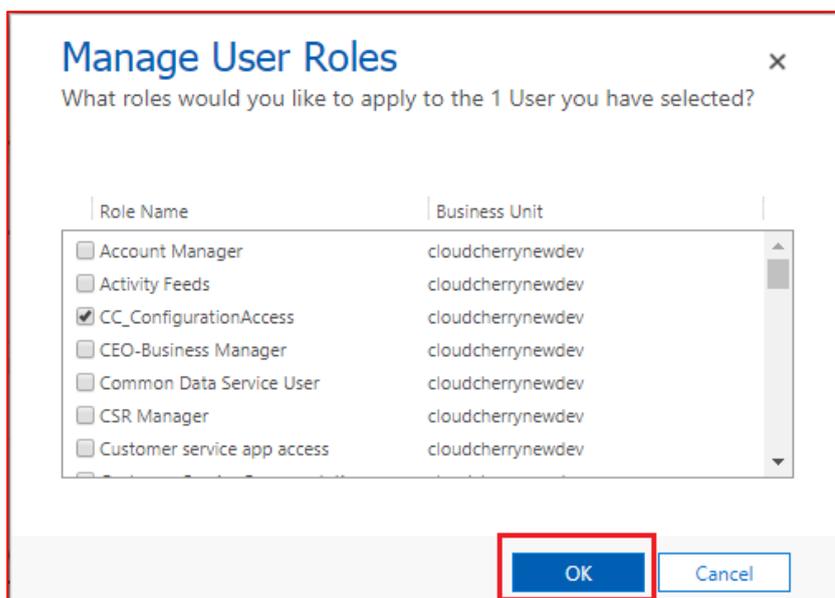
4.5. Once the record is opened, click to “MANAGED ROLES”.



4.6. Check the “CC_ConfigurationAccess” role from the list of the roles available.



4.7. Click on “OK” button.



5. Annexure

WEB API URL