MSCRMi Checklist by Application

This document serves a guide to help organize and setup an Acoustic Campaign and Microsoft Dynamics 365\CRM integration via Scribe Online. The steps provided do not always follow the order presented and will vary for each Company. **Please keep a copy of this guide and make notes for your Company’s records**.

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| --- | --- | --- | --- |
| **Date Completed** | **Integration Step or Task***(these steps don’t follow the order presented and varies for each Company depending on the Administrators involved)* | **Notes** |  |
| **Acoustic Campaign Admin** |  |
| ☐ Date |  [Create a new flexible database](https://help.goacoustic.com/hc/en-us/articles/360043570113-Create-a-Flexible-Database-for-Microsoft-Dynamics-CRMi) in Acoustic CampaignUsing an [existing flexible database](https://help.goacoustic.com/hc/en-us/articles/360043055354-Use-an-existing-flexible-database-for-CRMi) **is not advised** and will usually place the integration on hold by the CRM team.  |  |  |
| [ ]  Date | * + If specifying an Org Admin account for the integration, ensure the [integration account has API](https://help.goacoustic.com/hc/en-us/articles/360043054554-Create-an-integration-user-account) access
 |  |  |
| [ ]  Date | * + Select the new Flexible database as the CRM sync database. Configure your default [Acoustic Campaign to CRM sync options](https://help.goacoustic.com/hc/en-us/articles/360043572513-Set-the-default-sync-for-new-records) for ***new*** Leads
 |  |  |
| [ ]  Date | * [Generate the Refresh Token for MSCRM](https://help.goacoustic.com/hc/en-us/articles/360043054974-Get-the-Microsoft-Dynamics-integration-refresh-token)

  | To be given to CRM Admin to Configure the Acoustic Campaign Settings in MS Dynamics CRM |  |
| [ ]  Date | * [Generate the Refresh Token for Scribe Online](https://help.goacoustic.com/hc/en-us/articles/360043570673-Get-the-Scribe-refresh-token)
 | To be given to Scribe Admin to Create the Acoustic Campaign Connection in Scribe Online |  |
| **Microsoft Dynamics CRM Admin** |  |
| [ ]  Date | * + [Import](https://help.goacoustic.com/hc/en-us/articles/360043569513-Import-the-Acoustic-Campaign-MS-CRM-integration-solution-to-Microsoft-Dynamics-CRM) the Acoustic Campaign Integration Solution to your MS Dynamics CRM environment -  [Acoustic Campaign MS CRM Solutions](https://help.goacoustic.com/hc/en-us/articles/360043054034-Acoustic-Campaign-integration-solutions-in-Microsoft-Dynamics-CRM)
 |  |  |
| [ ]  Date | * Configure the [Acoustic Campaign settings](https://help.goacoustic.com/hc/en-us/articles/360043054054-Update-the-Acoustic-Campaign-General-Settings-in-Microsoft-Dynamics-CRM) in MS Dynamics CRM for the integration
 |  |  |
| [ ]  Date | * + Configure your default [MS CRM to Acoustic Campaign Sync options](https://help.goacoustic.com/hc/en-us/articles/360043572933-Synchronize-options-in-Microsoft-Dynamics-CRM) for ***new*** Lead and Contact records in CRM
 |  |  |
| **Tibco Scribe Online Admin** |  |
|  | * Provision a Tibco Scribe Online Organization
* A Scribe Online Org will be created by Acoustic Provisioning and the contact from the provisioning case will be invited to join the org as an administrator.
 |  |  |
| [ ]  Date | * Provision Scribe Online Cloud or On-Premise Agent(s)
* On premise agents must be installed by the assigned Admin(s) for the Company.
* Please review the [Proxy and Firewall Document](https://help.scribesoft.com/scribe/en/sol/agent/proxyinstall.htm)
 | A cloud agent will automatically be provisioned as a reference by the CRMi Specialist assigned to the Integration setup case. |  |
| [ ]  Date | * + [Setup Scribe Acoustic Campaign Connection](https://help.goacoustic.com/hc/en-us/articles/360043572633-Set-up-the-Scribe-Acoustic-Campaign-connection)
 |  |  |
| [ ]  Date | * + [Setup Scribe Dynamics 365 CRM Connection](https://help.goacoustic.com/hc/en-us/articles/360043572593-Configure-the-Scribe-Microsoft-CRM-Connection)
 |  |  |
| [ ]  Date | * Create a [Solution in Scribe](https://help.goacoustic.com/hc/en-us/articles/360043569573-Configure-the-Scribe-solution) for Syncing lead\contact records
 |  |  |
| [ ]  Date | * + Download and Import the mapping templates
* [Scribe maps for MS CRM integration](https://help.goacoustic.com/hc/en-us/articles/360043053454)
 |  |  |
| [ ]  Date | * + Map fields in Scribe to prepare for the initial sync.
 |  |  |
| **Cross Admin Collaborations** |  |
| [ ]  Date | **Plan field mappings.**Download the following document* [Field Mapping Template](http://doc.unica.com/doc.php?passkey=Xxi4MyHtR3mI&imc&1_2_0&en_us&Field.Mappping.Template)
 | CRM Admin and Acoustic Campaign Admin |  |
| **Finalize the Synchronization Setup**  |  |
| [ ]  Date | * + Review the maps & activate the initial record sync.
	+ If applicable, set the sync Schedule in Scribe Online.
 | The initial setup case will be closed after this step is completed and other CRM Integration support cases can be opened for customization or troubleshooting. |  |

## Additional Integration Features

* MSCRMi Features

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| Synchronizing Acoustic Campaign templates in folders | [Overview](https://help.goacoustic.com/hc/en-us/sections/360007669714-Synchronizing-Acoustic-Campaign-email-templates-in-folders) |  |
| Send Acoustic Campaign Email  | [Overview](https://help.goacoustic.com/hc/en-us/sections/360007715653-Working-with-Send-Acoustic-Campaign-Email) |  |
| Contact Insight | [Overview](https://help.goacoustic.com/hc/en-us/articles/360043573453-View-records-that-are-synchronizing-with-Acoustic-Campaign) |  |
| CRM Campaigns to Acoustic Campaign Contact Lists  | [Overview](https://help.goacoustic.com/hc/en-us/articles/360043056714-Synchronize-CRM-Campaign-List-Members-to-Acoustic-Campaign-Contact-List) |  |
| Sync Parent Account Details to Leads and Contacts | [Overview](https://help.goacoustic.com/hc/en-us/articles/360043056714-Synchronize-CRM-Campaign-List-Members-to-Acoustic-Campaign-Contact-List) | \*Requires the “CRM\_Account\_ID” field is mapped in the Lead-Contact maps |

* After the lead and contact record synchronization setup is complete you may consider synchronizing via Scribe Online:

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| --- | --- | --- |
| Statistics for Acoustic Campaign mailings sent from CRM | [Overview](https://help.goacoustic.com/hc/en-us/articles/360043056734-Synchronize-Acoustic-Campaign-emails-to-Microsoft-Dynamics-CRM) |  |
| Acoustic Campaign Lead Alerts to Create CRM Tasks  | [Overview](https://help.goacoustic.com/hc/en-us/articles/360043572833-Synchronize-Lead-alerts-to-the-CRM-tasks) |  |
| Other CRM records related to the synchronizing leads and contacts (opportunities, products, orders, etc).This is known as Relational Table synchronization. | [Overview](https://help.goacoustic.com/hc/en-us/articles/360043054614-Create-MSCRM-Relational-Tables) |  |