

Cardiris Corporate 5 for CRMs

How to configure Cardiris with Microsoft
Dynamics CRM and Salesforce CRM

3/14/2012

I.R.I.S. Products & Technologies

dgi



Table of Contents

| | |
|--|-----------|
| Copyrights..... | 2 |
| How to configure Cardiris for Microsoft Dynamics CRM | 3 |
| Introduction | 3 |
| Configuring the Cardiris CRM connector | 3 |
| Deploying the Cardiris CRM connector configuration ... | 14 |
| CRM server configuration for Cardiris users | 14 |
| Error reporting MS Dynamics CRM..... | 18 |
| How to configure Cardiris for Salesforce CRM..... | 21 |
| Introduction | 21 |
| Configuring the Cardiris CRM connector | 22 |
| Error reporting Salesforce CRM | 26 |

Copyrights

Cardiris5-dgi-26112011-02

Copyrights © 1995-2012 I.R.I.S. All Rights Reserved.

I.R.I.S. owns the copyrights to the Cardiris software, the online help system and to this publication.

The information contained in this document is the property of I.R.I.S. Its content is subject to change without notice and does not represent a commitment on the part of I.R.I.S. The software described in this document is furnished under a license agreement which states the terms of use of this product. The software may be used or copied only in accordance with the terms of that agreement. No part of this publication may be reproduced, transmitted, stored in a retrieval system, or translated into another language without the prior written consent of I.R.I.S.

This administrator guide utilizes fictitious names for purposes of demonstration; references to actual persons, companies, or organizations are strictly coincidental.

Trademarks

The Cardiris logo, Cardiris, IRISCard and IRIScan are trademarks of Image Recognition Integrated Systems S.A. Connectionist, Linguistic and Field Analysis Technology by I.R.I.S.

The Cardiris software is based in part on the work of the Independent JPEG Group.

All other products mentioned in this user's guide are trademarks or registered trademarks of their respective owners.

HOW TO CONFIGURE CARDIRIS FOR MICROSOFT DYNAMICS CRM

INTRODUCTION

In order for **Microsoft Dynamics CRM** to interact successfully with **Cardiris** and vice versa, **Cardiris Corporate for CRM's** must be set up correctly across your organization.

To do that, Microsoft Dynamics CRM* **administrators** must:

- Configure the Cardiris CRM connector on one machine;
- Deploy the CRM connector configuration on all Cardiris client computers;
- Set up relevant privileges for Cardiris users on the CRM server.

These three steps are discussed in the sections below.

Note that these sections only concern **CRM administrators**.

* "Microsoft Dynamics CRM" is referred to as "CRM" in the remainder of this chapter.

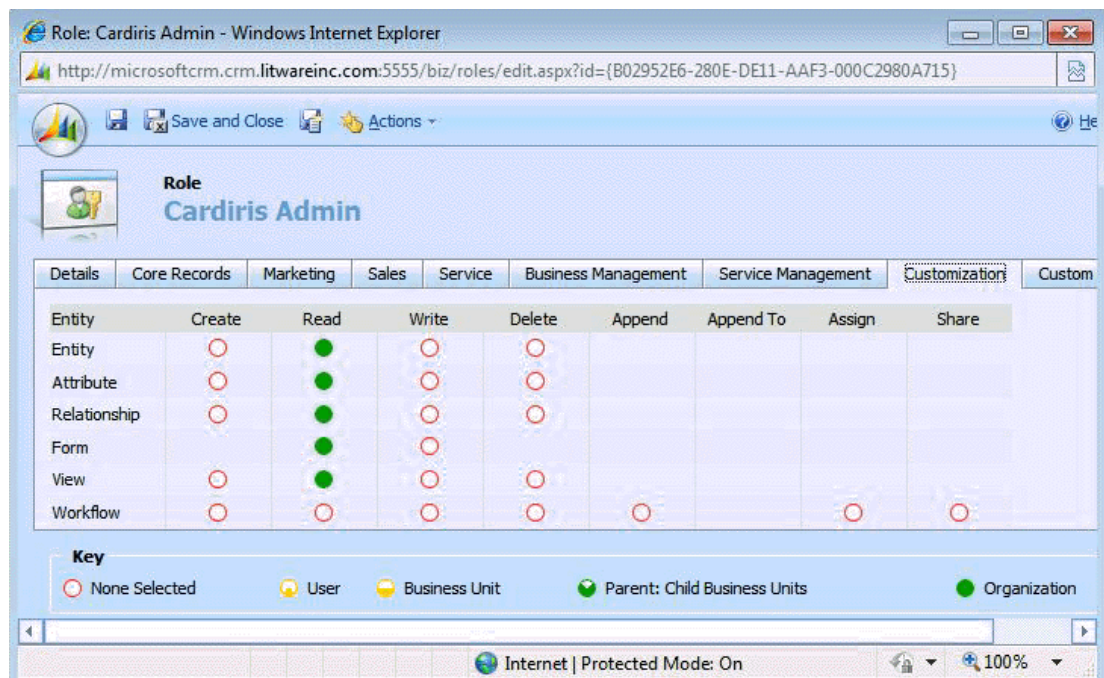
CONFIGURING THE CARDIRIS CRM CONNECTOR

The Cardiris CRM connector can be configured on any computer on which **Cardiris Corporate for CRM's** is installed.

Preliminary steps

Before you configure the Cardiris CRM connector, make sure you have:

- local administrator rights (or at least have the rights to create and modify files in the Cardiris installation directory).
- have access to CRM metadata, as depicted below.



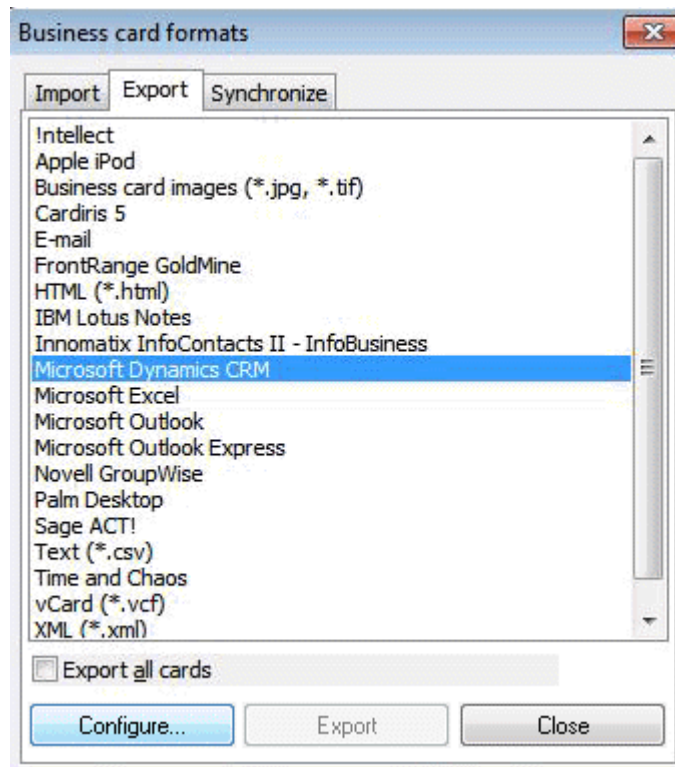
Operation

- Launch **Cardiris** from the Windows **Programs** menu or click the **Cardiris** icon on your desktop.

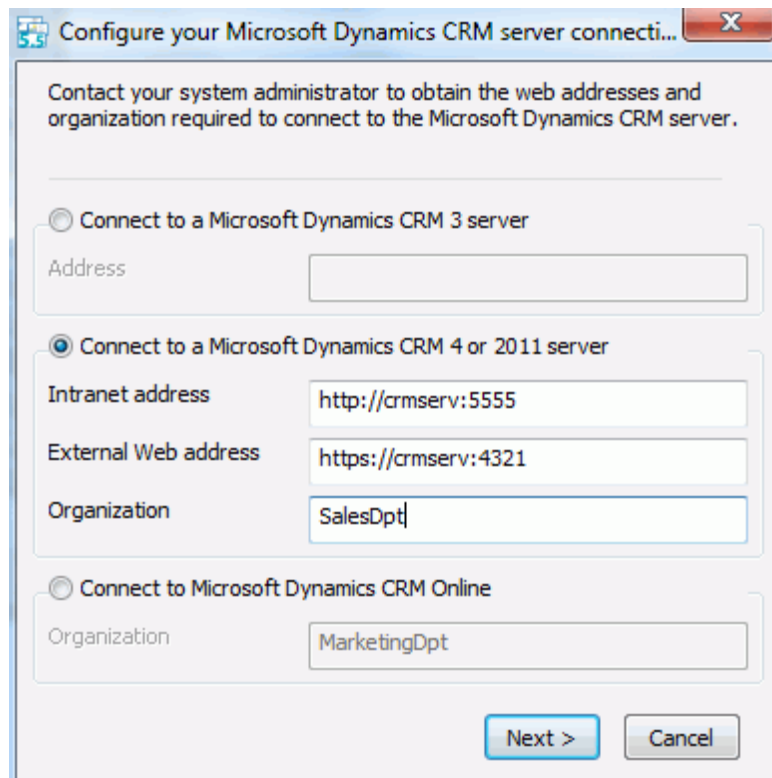
When you launch Cardiris for the first time a sample database opens.

- Click the **Export** button and select **Microsoft Dynamics CRM** from the list of available export applications.





- Click **Configure** to configure the CRM server connection.



- Cardiris can connect to:
 - a Microsoft Dynamics CRM 3 server
 - a Microsoft Dynamics CRM 4 or 2011 server.
 - a Microsoft Dynamics CRM Online server.

Connecting to a Microsoft Dynamics CRM 3 server

- To connect to a **CRM 3** server, select the corresponding option.
- Then fill in the **Address** field.

Configure your Microsoft Dynamics CRM server connection

Contact your system administrator to obtain the web addresses and organization required to connect to the Microsoft Dynamics CRM server.

Connect to a Microsoft Dynamics CRM 3 server

Address:

Connect to a Microsoft Dynamics CRM 4 or 2011 server

Intranet address:

External Web address:

Organization:

Connect to Microsoft Dynamics CRM Online

Organization:

Next > Cancel

Note: to connect to a Microsoft Dynamics CRM 3 server, Cardiris uses an **On-premise (Integrated)** connection.

Connecting to a Microsoft Dynamics CRM 4 or 2011 server

- To connect to a **CRM 4** or **2011** server, select the corresponding option.
- Fill in the **Intranet address** or **External Web** address, or both.

Configure your Microsoft Dynamics CRM server connection

Contact your system administrator to obtain the web addresses and organization required to connect to the Microsoft Dynamics CRM server.

Connect to a Microsoft Dynamics CRM 3 server

Address

Connect to a Microsoft Dynamics CRM 4 or 2011 server

Intranet address

External Web address

Organization

Connect to Microsoft Dynamics CRM Online

Organization

Next > Cancel

Cardiris supports two connection types when connecting to a **CRM 4** or **2011** server. Cardiris can either connect to an **Intranet address**, which establishes an **On-premise (Integrated)** connection or connect to an **External Web address**, which establishes an **IFD** (Internet-Facing Deployment) connection.

Note: Cardiris always tries to establish an **On-premise (Integrated)** connection first. Should that fail, then Cardiris establishes an **IFD** connection and you will be prompted to authenticate.

Note: to establish a successful **On-premise (Integrated)** connection, the client computer running the Cardiris software must reside in the same domain as the CRM server.

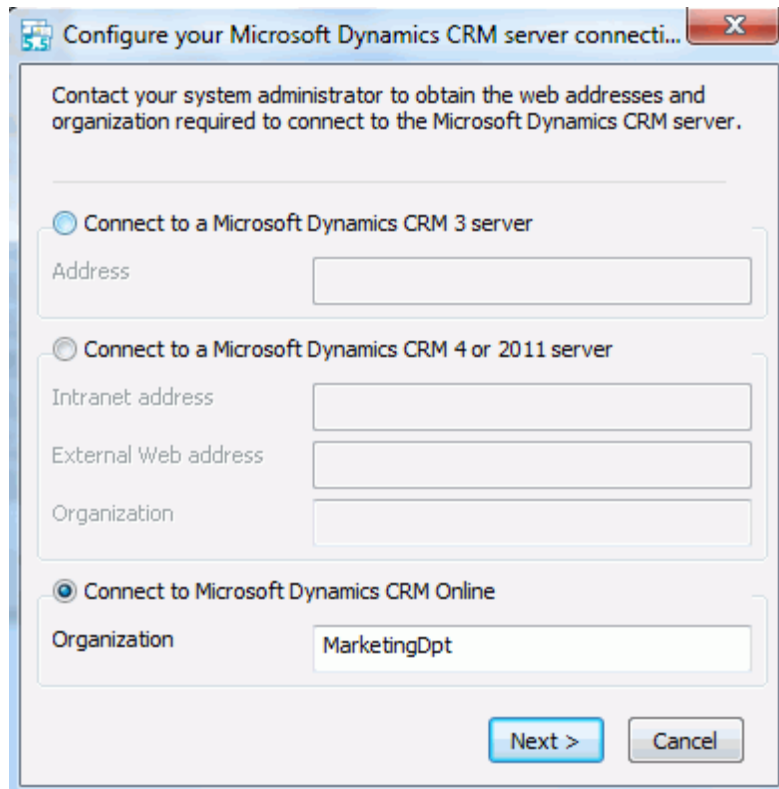
- Fill in the **Organization** field.

Should you fill in an incorrect organization, Cardiris uses the information in the **address** field to draw up a list of valid organizations found on the CRM server. If only one organization exists on the CRM server, Cardiris automatically selects that organization and the window **CRM organizations** will not be displayed.

Connecting to Microsoft Dynamics CRM Online

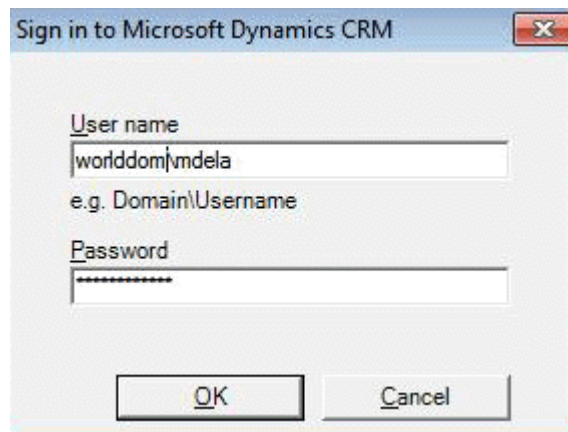
- To connect to CRM online select the third option.
- Fill in the **Organization** field.

Should you fill in an incorrect organization, Cardiris uses the information in the **address** field to draw up a list of valid organizations found on the CRM server. If only one organization exists on the CRM server, Cardiris automatically selects that organization and the window **CRM organizations** will not be displayed.



- Then click **Next** to continue.

In case Cardiris connects to an **External Web address**, or to **CRM Online** you are prompted to authenticate. Fill in your **CRM User name** and **Password** and click **OK**.



All the settings above only need to be set once. The next time you connect to your CRM server, Cardiris remembers your settings.

- When the CRM server has been configured you need to configure your **CRM field mapping**.
- Click the tabs **Leads**, **Contacts** or **Accounts** depending on which entity type you want to configure.

Note that field mapping is entity-specific. This means the configuration process must be done separately for **Leads**, **Contacts** and **Accounts**.

General note: the configuration may take some time, depending amongst others on the network configuration and the proxy settings.

Configure your CRM field mapping

Leads | Contacts | Accounts

| | |
|------------|-----------------|
| Company | Company Name |
| First name | First Name |
| Last name | Last Name |
| Title | Job Title |
| Address | Street 1 |
| | and |
| | Street 2 |
| and | |
| | Street 3 |
| City | City |
| ZIP code | ZIP/Postal Code |
| State | State/Province |
| Country | Country/Region |
| Phone | Business Phone |
| Phone 2 | Home Phone |
| Cell phone | Mobile Phone |
| Fax | Fax |
| E-mail | E-mail |
| Website | Web Site |

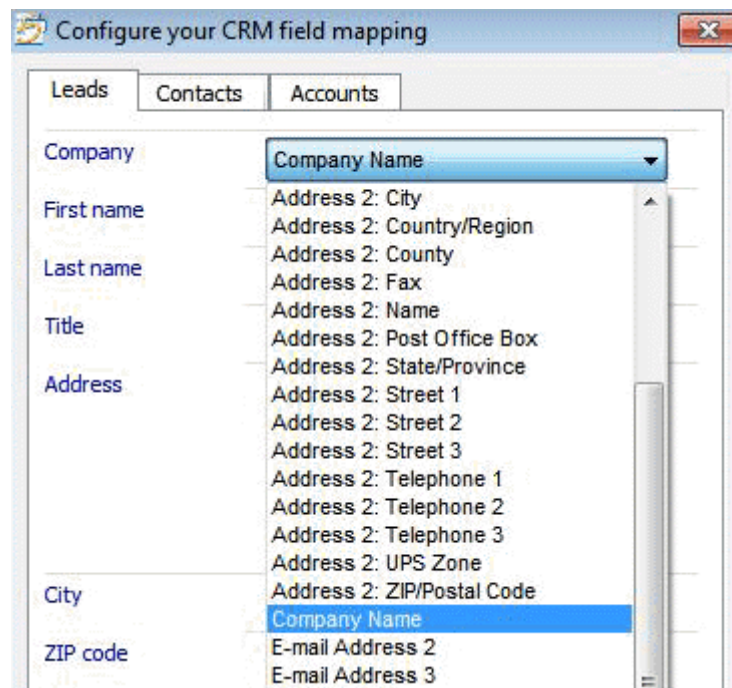
In the list below select the CRM entity type to which Cardiris contacts should be mapped

Leads

Restore Defaults

OK Cancel Apply

- The Cardiris fields are listed on the left. Link each Cardiris field to the required CRM field by selecting it from the drop-down list on the right.

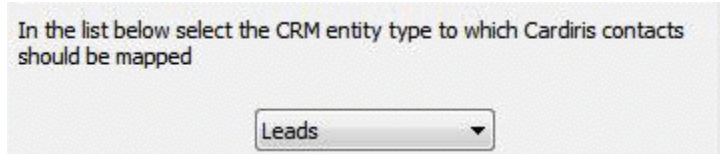


When a CRM field has been mapped to a Cardiris field, the CRM field is removed from the other drop-down lists. This means you can never map a single CRM field to several Cardiris fields. By preventing this, correct 1:1 field mapping is guaranteed.

Note that pictures and notes from Cardiris records are always exported to the **Notes** field in **CRM 3, 4** and **2011 Server** and to the **Notes and Activities** section in **CRM Online**.

Note: not all CRM fields are eligible for field mapping. Cardiris automatically discards CRM fields that are not:

- readable
 - writable
 - updatable
 - of the Strings type
- Then, at the bottom of the window, select the **CRM entity type** to which Cardiris contacts are to be mapped. Cardiris contacts can either be mapped to CRM **Leads** or CRM **Contacts**.



Note that the field mapping process behaves differently for **Leads** and **Contacts**:

- When a Cardiris contact is mapped to a CRM Lead, the Lead's company name will be the one specified in the Cardiris contact.
 - When a Cardiris contact is mapped to a CRM Contact, a new CRM account is be created (if this CRM account does not already exists), using the company name of the Cardiris contact. The CRM contact will be linked either to the newly created CRM account or to the existing one.
- When you are done configuring the field mapping:
 - Click **OK** to save the configuration. The Cardiris contacts are exported as **Leads** or **Contacts**, depending on the entity you have chosen in the previous step, and the window is closed.
 - Or click **Apply** to save the configuration and export the Cardiris contacts without closing the window. You can now click one of the other tabs at the top of the window and repeat the field mapping process.

Note: if you are not satisfied with the configuration, click **Restore defaults** to return to the initial field mapping.

- When you have configured the CRM field mapping, the Cardiris CRM connector configuration can be deployed.

DEPLOYING THE CARDIRIS CRM CONNECTOR CONFIGURATION

Once the CRM connector has been configured, it must be deployed on all client computers on which Cardiris Corporate for CRM's is installed.

Operation

- The CRM connector configuration is stored in a file called **msdyncrm_connector.cfg** and can be found in the Cardiris installation directory.
- Copy this file to all client computers on which Cardiris Corporate for CRM's is installed.

The configuration automatically applies to all users on the client computers.

Important note: the configuration file **must not** be edited manually.

- Once the CRM connector configuration has been deployed to all client computers, the user privileges in Microsoft Dynamics CRM can be set.

CRM SERVER CONFIGURATION FOR CARDIRIS USERS

In order for Cardiris Corporate for CRM's to function properly, several user privileges in Microsoft Dynamics CRM must be set in a well-defined manner.

Preliminary operation

To set up the required privileges, I.R.I.S. recommends that CRM administrators:

- Create a dedicated role for Cardiris users on the CRM server and set up relevant privileges accordingly;
- Assign the dedicated role to CRM users who need to exchange contact information between Cardiris and Microsoft Dynamics CRM.

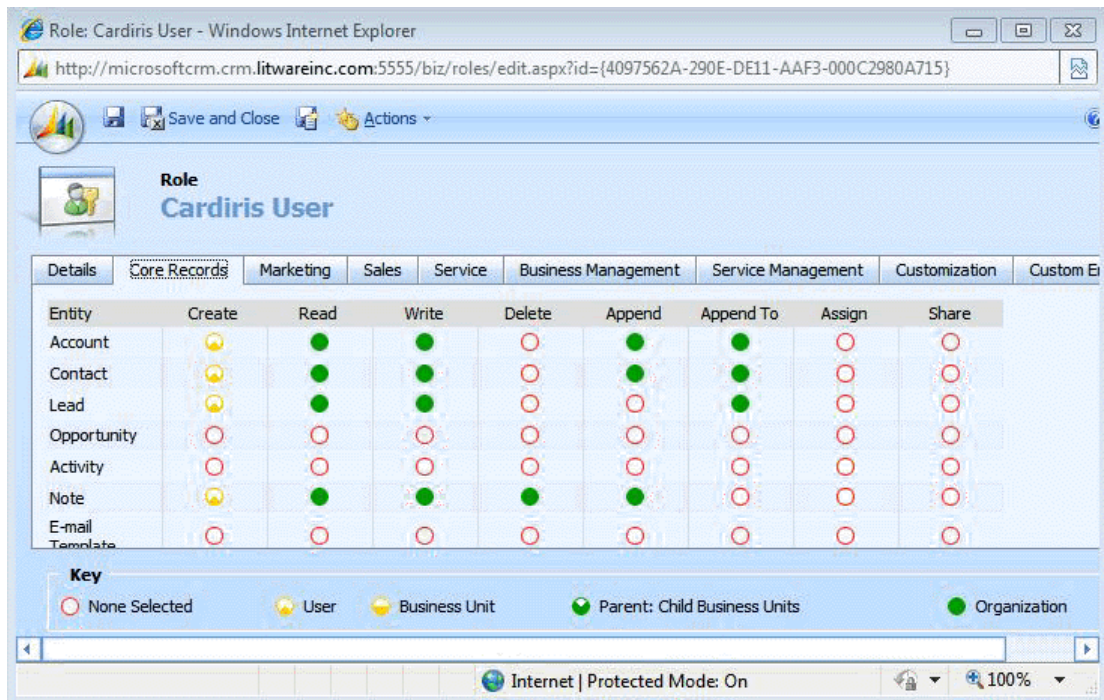
Operation

Once the Cardiris role has been created, privileges for that role can be set through a **standard configuration** or a **minimal configuration**.

Standard configuration

In a standard configuration the **core records** privileges need to be set as depicted below.

Privileges are set such that the current user can read, modify, and update Contacts, Leads or Accounts that belong to other users.

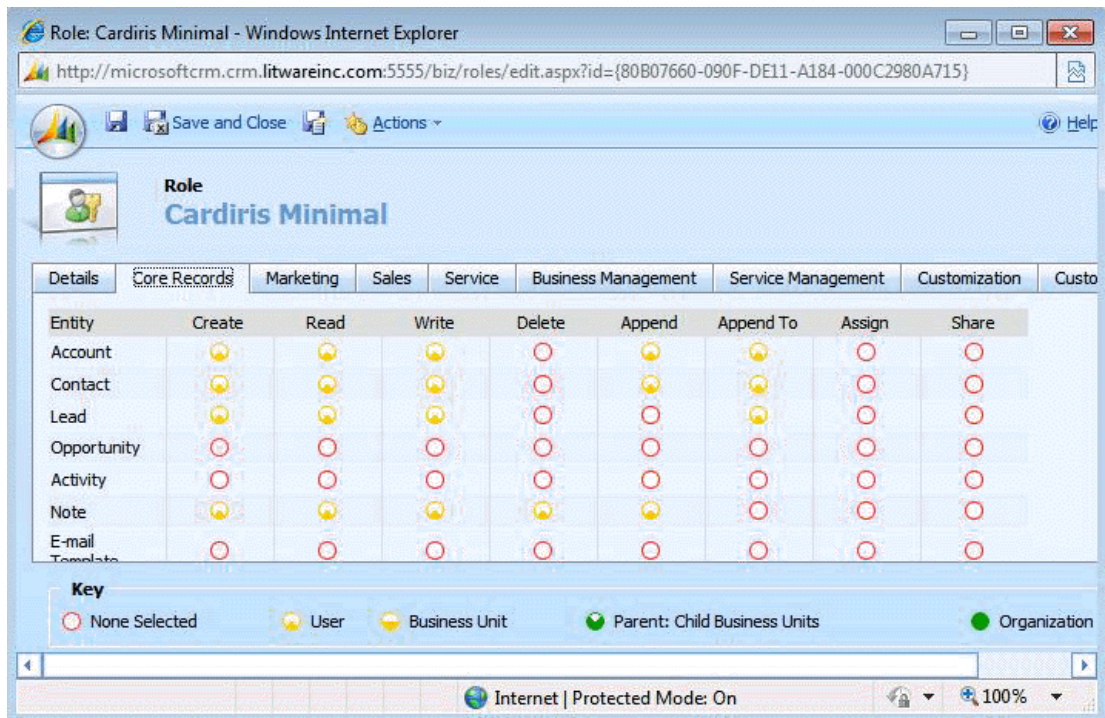


This means that the current user is able to use the **Find duplicates module** of Cardiris when exporting Cardiris contacts to Microsoft Dynamics CRM, and search for duplicates between his own Cardiris databases and the entire CRM database.

Minimal configuration

In a minimal configuration the **core records** privileges need to be set as pictured below.

Privileges are set such that the current user can only read, modify and update Contacts, Leads or Accounts belonging to him.



This means that the current user is only able to use the **Find duplicates module** to search for duplicates between his own Cardiris database and the CRM contacts or leads that belong to him only.

Note:

User privileges are not independent from one another. Updating certain privileges while leaving others unchanged will cause errors.

Example

User A uses a minimal configuration. When the administrator upgrades the reading privilege for **Leads** in the **Core Records** tab from **User** to **Organization**, while keeping the writing privilege unchanged, this will cause an error. The reason why this happens is the fact that Cardiris takes **all CRM contacts belonging to all users** into account when searching for duplicates in the **Find duplicates module**. And if one contact belonging to other users needs updating, Cardiris throws an error.

ERROR REPORTING MS DYNAMICS CRM

Error detection and reporting capabilities have been upgraded in Cardiris 5. Whenever an error occurs, the error information is stored in a Cardiris log file. This log file is located in your local temp folder. To access the temp folder, type in %TEMP% in Windows Explorer. If necessary, you can always send the log file to I.R.I.S. support for further assistance: www.irislink.com/support.

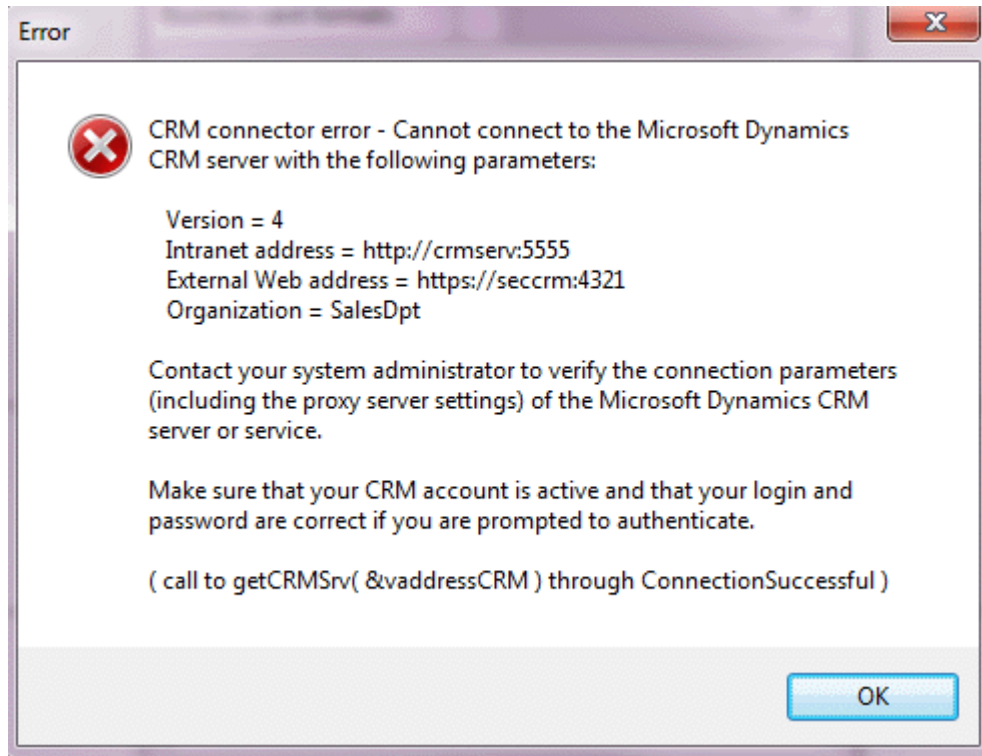
Note that a new log file is created each time you start Cardiris.

Below you find an overview of common errors that may occur while exporting to Microsoft Dynamics CRM:

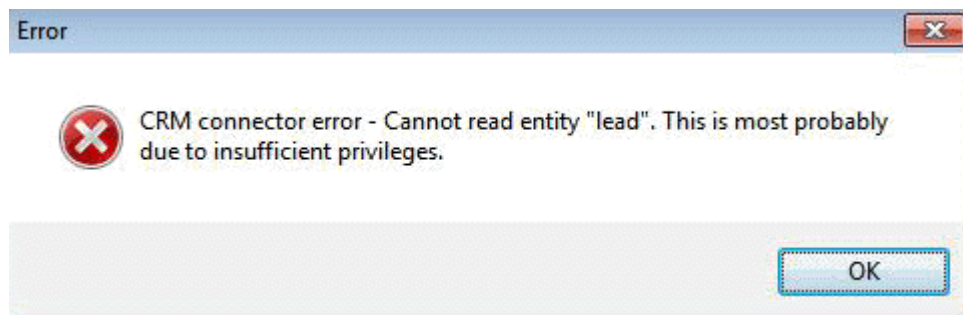
- The CRM server information (url) is incorrect.
- The configuration file was edited by hand and is incomplete or inconsistent.
- A local administrator tries to configure the CRM connector but does not have enough administrative rights in Microsoft Dynamics CRM.
- A local user tries to configure the CRM connector but does not have local administrative rights.
- Cardiris contacts are mapped to a CRM entity (lead, contact) to which the current user does not have access.

Examples

Typical error generated when Cardiris cannot connect to a CRM server.



Typical error message generated when user privileges conditions are not met.



Notes:

Some operations generate time-outs that, in turn, translate into error messages of the type **server busy**. When such an error message is displayed, simply wait for a few moments and click **Retry**.

Error messages generated by the CRM connector are displayed in English onl

HOW TO CONFIGURE CARDIRIS FOR SALESFORCE CRM

INTRODUCTION

In order for **Salesforce CRM** to interact successfully with **Cardiris** and vice versa, **Cardiris Corporate for CRM's** must be set up correctly across your organization.

To do that, Salesforce CRM* **administrators** must:

- have administrator rights to an Enterprise, Unlimited or Developer Salesforce CRM account.
- configure the Cardiris CRM connector.
- grant Cardiris users who need to export to Salesforce CRM the necessary access rights to the Salesforce API.

Important note: users must export to exactly the same Salesforce account type as used by the administrator to do the configuration.

*"Salesforce CRM" is referred to as "CRM" in the remainder of this chapter.

CONFIGURING THE CARDIRIS CRM CONNECTOR

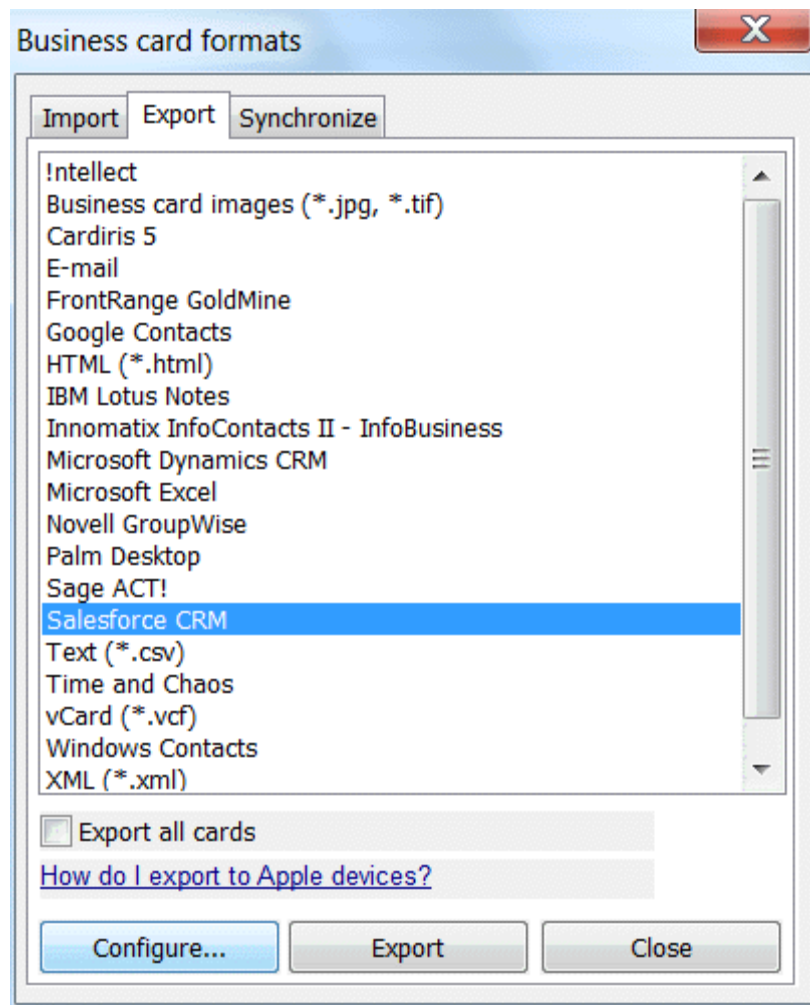
In order to configure the Cardiris CRM connector you need to have administration rights to the computer Cardiris is installed on and to the Salesforce CRM account you want to export to.

Important note: an Enterprise, Unlimited or Developer Salesforce account is needed to export contacts from Cardiris.

To configure the connector:

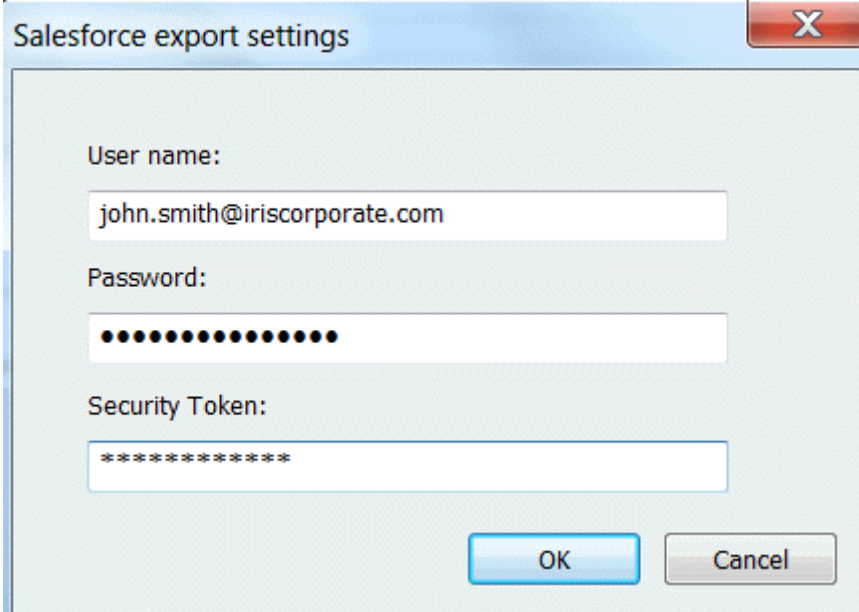
- Right-click the Cardiris icon on the desktop and select **Run as administrator**.
- In the main toolbar click **Export**, and select **Salesforce CRM** from the list of available export applications.





- Then click **Configure** and enter the **Username**, **Password** and **Security Token** of your Salesforce account.

Note: these credentials must correspond to an Enterprise, Unlimited or Developer Salesforce account. It is not possible to configure the connector if you are using a different type of Salesforce account.



The screenshot shows a dialog box titled "Salesforce export settings". It has a standard Windows-style title bar with a close button (X) in the top right corner. The dialog contains three input fields:

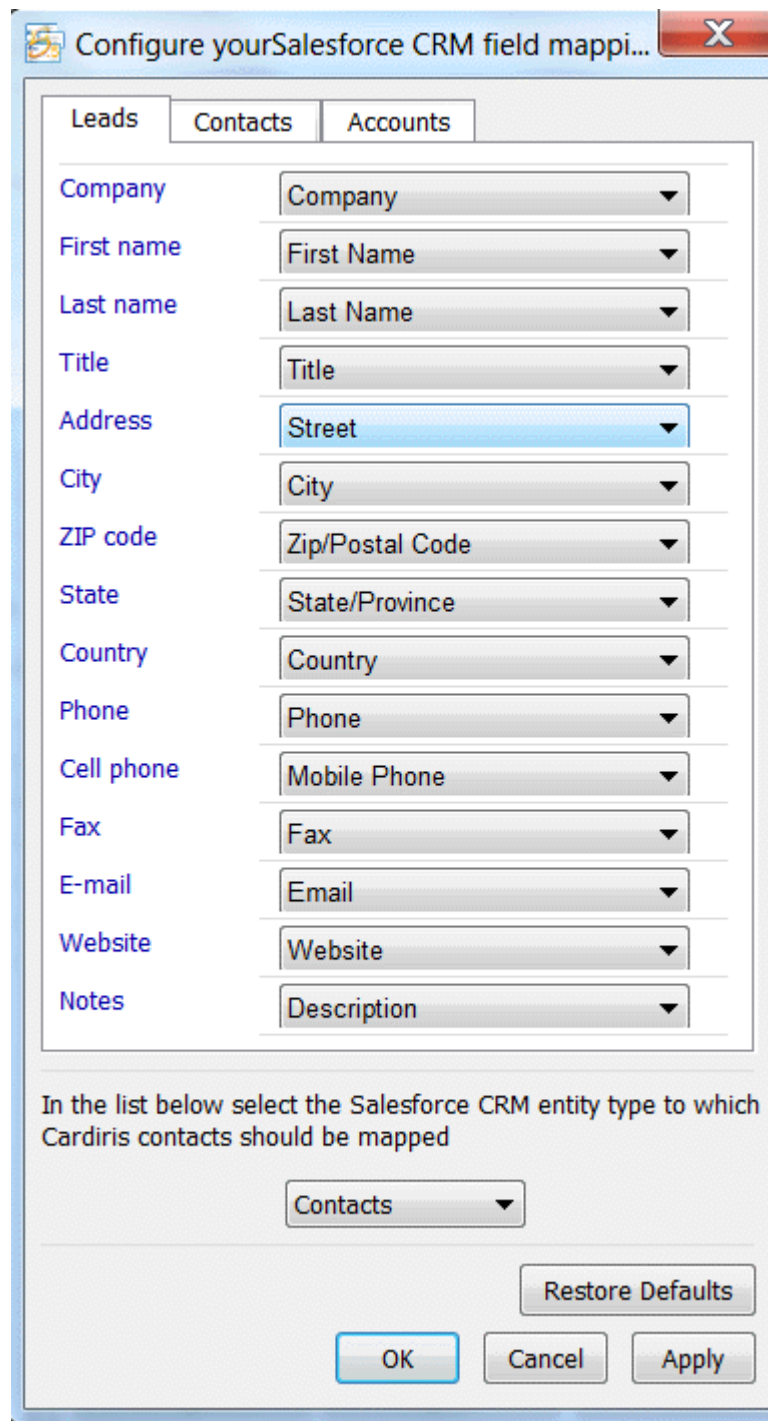
- User name:** A text box containing the email address "john.smith@iriscorporate.com".
- Password:** A text box filled with 12 black dots, indicating a masked password.
- Security Token:** A text box filled with 10 asterisks, indicating a masked security token.

At the bottom right of the dialog, there are two buttons: a blue "OK" button and a grey "Cancel" button.

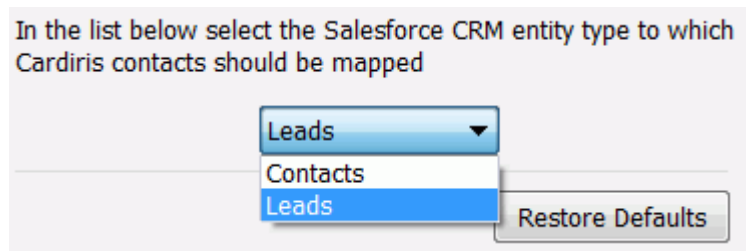
- Next, you are prompted to configure your **CRM field mapping**.
- Click the tabs **Leads**, **Contacts** or **Accounts** depending on which entity type you want to configure.

Note that in most cases you can use the default mapping.

Also note that field mapping is entity-specific. This means the configuration process must be done separately for **Leads**, **Contacts** and **Accounts**.



- Then, at the bottom of the window, select the **CRM entity type** to which Cardiris contacts are to be mapped. Cardiris contacts can either be mapped to CRM **Leads** or CRM **Contacts**.



Note that the field mapping process behaves differently for **Leads** and **Contacts**:

- When a Cardiris contact is mapped to a CRM Contact, it is created in the Contacts section of Salesforce. The company name in Cardiris becomes the account name in Salesforce.
 - When a Cardiris contact is mapped to a CRM Lead, it is created in the Leads section of Salesforce.
- When you are done configuring the field mapping, click **Apply** to save the configuration.

Note: if you are not satisfied with the configuration, click **Restore defaults** to return to the initial field mapping.

- Once you have configured the connector, you need to grant Cardiris users access rights to the Salesforce API in order to be able to export.

ERROR REPORTING SALESFORCE CRM

Error detection and reporting capabilities have been upgraded in Cardiris 5. Whenever an error occurs, the error information is stored in a Cardiris log file. This log file is located in your local temp folder. To access the temp folder, type in %TEMP% in Windows Explorer. If necessary, you can always send the log file to I.R.I.S. support for further assistance: www.irislink.com/support.

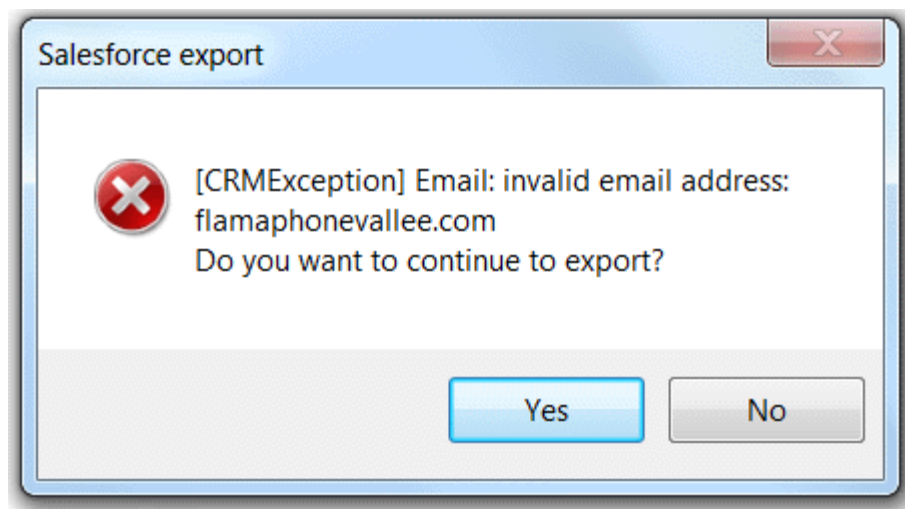
Note that a new log file is created each time you start Cardiris.

Below you find an overview of common errors that may occur while exporting to Microsoft Dynamics CRM:

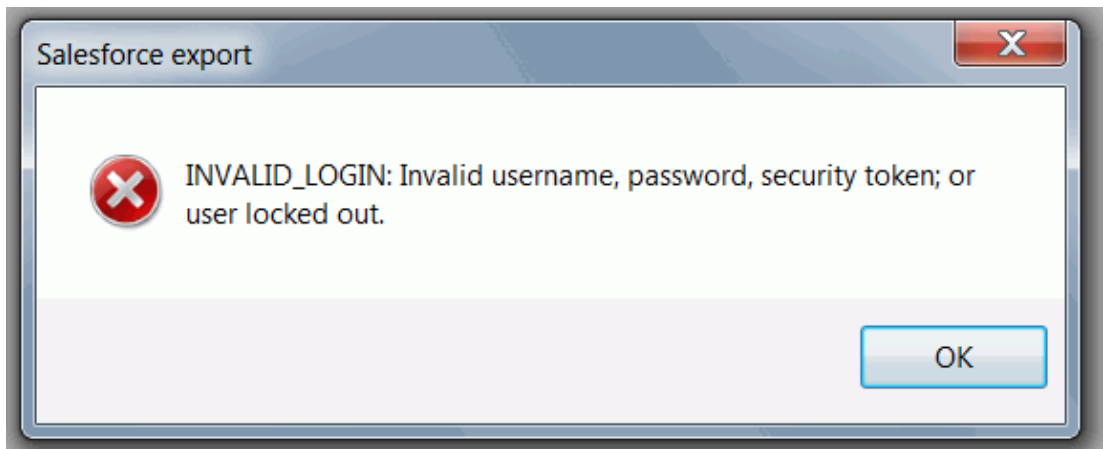
- The format of the Cardiris contacts is not in line with Salesforce's CRM policy.
 - E.g. the e-mail address does not contain an @.
 - E.g. the contact's last name is missing.
- The administrator who is trying to configure the Salesforce CRM connector does not have an adequate Salesforce account (Enterprise, Unlimited or Developer edition account required).
- The user who is trying to export to Salesforce CRM does not have access to the Salesforce API.
- The user is exporting to a different Salesforce account than the one used by the administrator to do the configuration.

Examples

Typical error when contacts are not in line with Salesforce's CRM policy



Typical error in case of incorrect login



Typical error when the user does not have access to the Salesforce API.

