

Using Microsoft Social Engagement Together with Dynamics CRM

Jukka Niiranen

2015-11-17





Questions of the day

- What main features does MS Social Engagement (MSE) offer today?
- How can Dynamics CRM customers take advantage of the standard integration to MSE?
- What type of customization opportunities are there for making use of social data inside CRM?



About me

- Dynamics CRM consultant from Helsinki
- Working at [Digital Illustrated Finland](#)
- Dynamics CRM addict since 2005
- Frequent blogger & #MSDYNCRM evangelist on social media
 - Blog: [survivingcrm.com](#)
 - [@jukkan](#) on Twitter
- Microsoft MVP since 2013



Jukka Niiranen
[@jukkan](#)

Consultant @ Digital Illustrated
Microsoft Dynamics CRM MVP



Topics we'll cover

MSE basics

- Licensing
- Search topics
- Social profiles
- Analytics
- Social Center
- Activity Map
- Alerts
- Feature roadmap

CRM integration

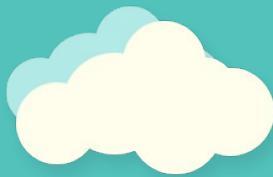
- MSE to CRM
- CRM to MSE
- Social profiles
- Social activities
- MSE Link-to-CRM
- Record creation rules
- Channel properties
- Current limitations

CRM customization

- Mobile
- Dashboards
- Custom entities
- Workflows
- Navigation
- Search
- Entity images
- External profiles

Brief History of MSFT Social





MSFT & Social in 2011: CRM team's vision

Microsoft® FUSELABS

Eric Boocock  Sign Out

File Dashboards

Save As New Edit Delete Set As Default Share Dashboard Assign Refresh All Advanced Find

Dashboard Management Action Query

Workplace

- My Work
 - Dashboards
 - Vibe
 - Get Started
 - Activities
 - Calendar
 - Imports
 - Duplicate Detection
 - Queues
 - Articles
 - PowerFind
 - Parrot
 - Reports
 - Announcements
- Customers
 - Accounts
 - Contacts

Workplace

- Sales
- Content Management
- Marketing
- Service
- Settings
- Pulse
- Resource Center

Dashboard: Social Activity

Microsoft Dynamics CRM Social Activity

UKsNum1MSCloud RT @mscrmonline: A must read resource for those of you currently evaluating #Microsoft #Dynamics #CRM Online http://t.co/2xrzfzpl #msdynncrm #crm2011 #cloud 10 hours ago · reply · retweet · favorite

CRMcomparison Risks of purchasing an industry-specific vs a customized CRM solution

Buzz on Twitter>>
CRM
ERP

3 days | day | hour

Jul 31 Aug 1 Aug 2

Get a SocialGadget Microsoft FUSE Labs

Microsoft Dynamics ERP Social Activity

MSFTDynamicsERP RT @msdynax: Microsoft Dynamics AX 2012 is now on the market - http://t.co/ReeZnOI #msdynax #erp #AX2012 yesterday · reply · retweet · favorite

MSFTDynamicsERP RT @msdynax: Hold the Date for the AX Technical Conference 2011, Fall Edition (in Nice, France) - http://t.co/WwiVDeI #msdynax #erp #AX2012 yesterday · reply · retweet · favorite

msdynncrm

worldwide #msdynncrm #msdynncrm #arm Microsoft CRM Cloud Microsoft

3 days | day | hour

Jul 31 Aug 1 Aug 2

Get a SocialGadget Microsoft FUSE Labs

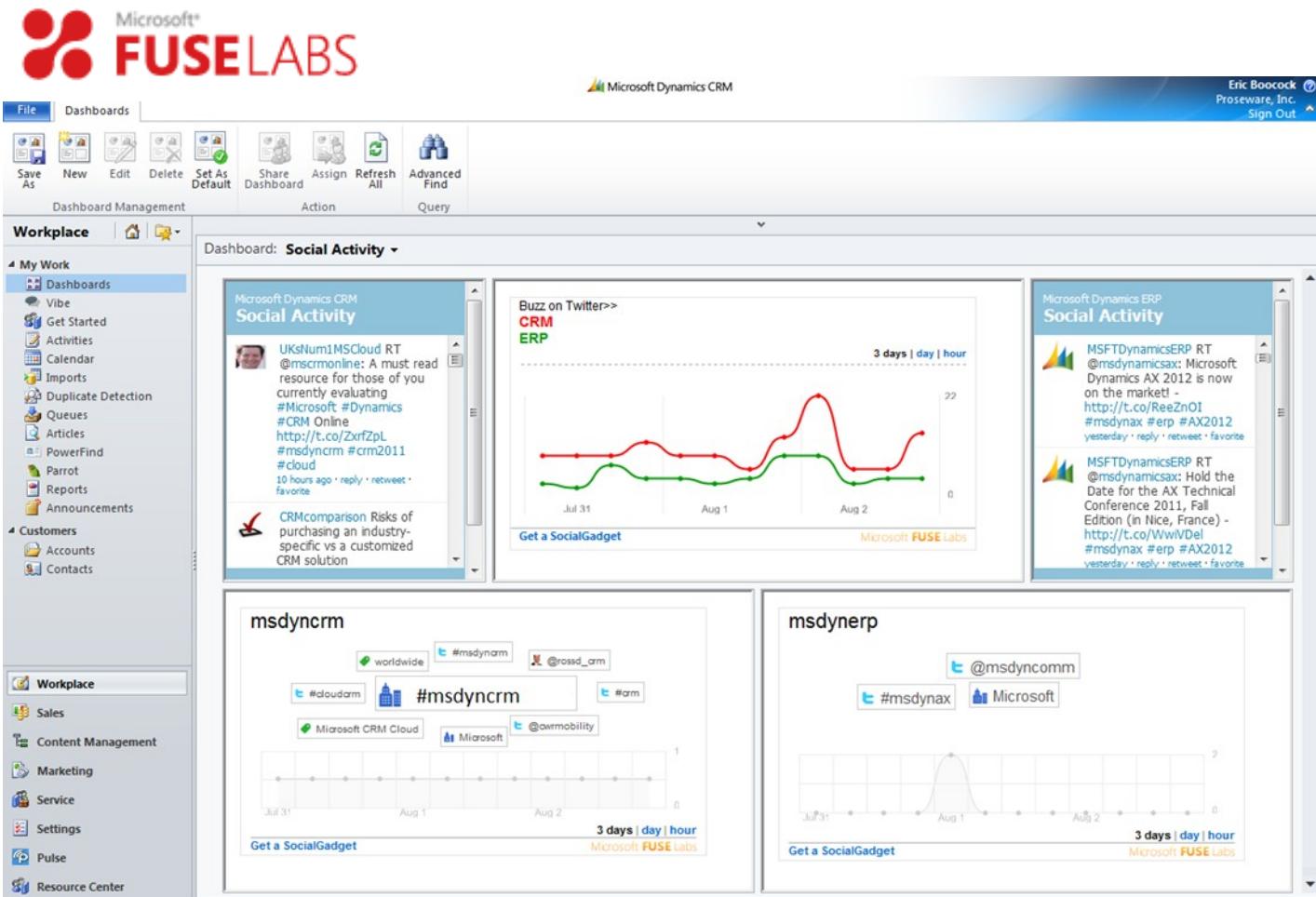
msdynerp

@msdyncomm #msdynax Microsoft

3 days | day | hour

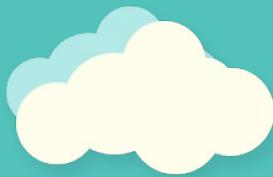
Jul 31 Aug 1 Aug 2

Get a SocialGadget Microsoft FUSE Labs



<http://>

www.slideshare.net/lauraannerobinson/building-your-business-hub-microsoft-dynamics-crm-and-social-technologies



MSFT & Social in 2011: SQL team's vision

MICROSOFT

CODENAME "SOCIAL ANALYTICS"

Data Acquisition: Bill Gates

- 1 hour ago **AverageMDBol** Devon (Dev-In)
Fortune will have exclusive excerpt of Steve Jobs bio Monday focusing on relationship with Bill Gates <http://t.co/x7bp4VZm>
source: twitter.com
- 1 hour ago **MARCELO_CUEVA** Marcelo Cueva
My special greetings to the large planet. In the Family Guy theme What is the greatest satisfaction of Bill Gates?
source: twitter.com
- 1 hour ago **xCoolQuotes** Nicole, Genifer,Diana
People everywhere love Windows-Bill Gates [#XCO](#)
source: twitter.com
- 1 hour ago **CNNMoney** CNNMoney.com
Apple 2.0: Steve Jobs and Bill Gates: Exclusive bio excerpt in Fortune Monday <http://t.co/YGQNaWWS> [\\$AAPL](#)
source: twitter.com
- last reply 1 hour ago **D_Micha** Danielle Michaud
[@sandymeesh](#) get Uncle Bob to get Bill

Data Acquisition: Windows 8

- 3 hours ago **AwkwardCoder** AwkwardCoder
Can I use Sqlite in a winRT application (javascript)?
source: stackoverflow.com
- 3 hours ago **VG** VG
Transform Windows 7 into Windows 8 Developer Preview Using '8 Skin Pack 7.0*
source: askvg.com
- 3 hours ago **VG** VG
Transform Windows XP into Windows 8 Developer Preview Using '8 Skin Pack 5.0*
source: askvg.com
- 3 hours ago **EverythingMS** Everything Microsoft
A deeper dive into Windows 8: can Microsoft's big bet pay off? <http://t.co/Y37K2uWd>
source: twitter.com
- 4 hours ago **ZDNet** ZDNet
A deeper dive into Windows 8: can Microsoft's big bet pay off? <http://t.co/LcoqIPV88T>
source: twitter.com

Windows 8 NOT T

- 3 hours ago **AwkwardCoder** AwkwardCoder
Can I use Sqlite in a winRT application (javascript)?
source: stackoverflow.com
- 3 hours ago **VG** VG
Transform Windows 7 into Windows 8 Developer Preview Using '8 Skin Pack 7.0*
source: askvg.com
- 3 hours ago **VG** VG
Transform Windows XP into Windows 8 Developer Preview Using '8 Skin Pack 5.0*
source: askvg.com
- 4 hours ago **Jorge Montez** Jorge Montez
Microsoft ao ataque: Android é para nerds
source: technet.com
- 6 hours ago **thegeekbros** thegeekbros
ASUS teases another Transformer on video
source: thegeekbros.wordpress.com
- 4 hours ago **Not Attributed** Not Attributed
Filtran las características del supuesto

by BillG Melinda or Foundation

- 13 1 **BillGates** Bill Gates
Malaria eradication is an ambitious, long-term goal—but a goal [@melindagates](#) and I are 100% committed to. [#endmalaria](#) <http://t.co/Th4adyYT>
source: twitter.com
last reply 37 min ago
16 replies
- 2 **BillGates** Bill Gates
Innovation is one of the most powerful forces in the world. It can make the impossible possible. [#endmalaria](#) <http://t.co/m3vpQcJf>
source: twitter.com
last reply 1 hour ago
39 replies
- 7 **BillGates** Bill Gates
For those of us lucky enough to get to work with Steve, it's been an insanely great honor. I will miss Steve immensely <http://t.co/g4HLDY1b>
source: twitter.com
last reply 1 hour ago
297 replies
- 1 **RodrigoFPrieto** Rodrigo Fdez. Prieto
Bravol La fortuna de [@BillGates](#) acerca una vacuna contra la malaria - <http://t.co/g9y7JUg> <http://t.co/E3Jct64B> via [@cincoideascom](#)
source: twitter.com
5 hours ago

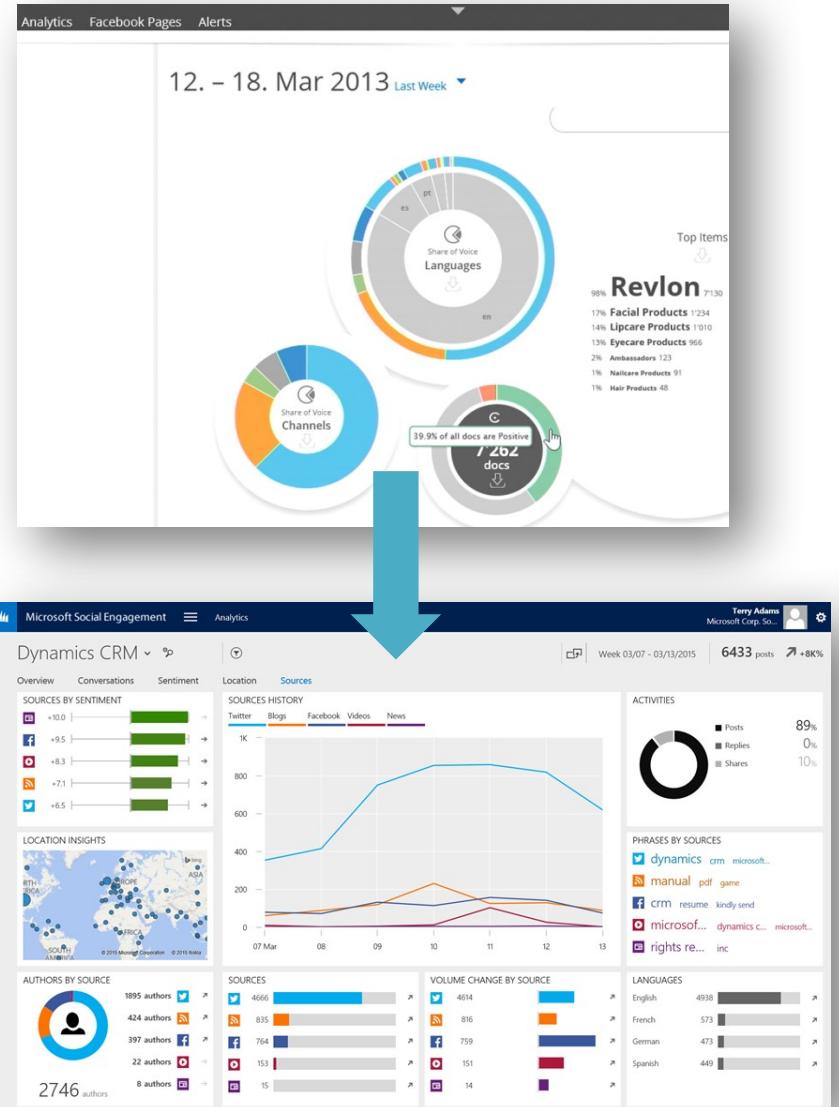
<http://www.zdnet.com/article/microsoft-delivers-service-for-integrating-social-web-data-into-business-apps>



MSFT & Social: making it real



- MSFT acquired Swiss company & product “Netbreeze” in March 2013
- Initially branded as “Microsoft Social Listening”
- Rebranded & expanded into “Microsoft Social Engagement” in 2015



MSE Core Functionality





Licensing

- **MSE Professional**
 - Included in CRM Online Professional (for 10+ users), or purchased separately
 - Access (almost) all MSE features
 - Search 10k posts/month
- **MSE Enterprise**
 - Included in CRM Online Enterprise, or purchased separately
 - *Required for linking MSE posts to CRM*

Social Engagement Professional

Social listening, share of voice, and trend alerts

\$75
per user/month

[Buy](#)

Microsoft Social Engagement Professional includes:

- Social listening
- Social center (2 streams/user)
- Social accounts
- Trend alerts

Microsoft Social Engagement CRM pricing includes 10,000 posts per organization/month.

Additional posts:

- \$100 for 10,000 posts/month
- \$700 for 100,000 posts/month
- \$4,000 for 1,000,000 posts/month

Social Engagement Enterprise

Unlimited streams, sharing streams, assigning posts, and integration with Microsoft Dynamics CRM

\$125
per user/month

[Buy](#)

Microsoft Social Engagement Enterprise includes:

- Social listening, social accounts, trend alerts

Plus: Social center includes unlimited streams, sharing streams and assigning posts to users

Microsoft Social Engagement CRM pricing includes 10,000 posts per organization/month.

Additional posts:

- \$100 for 10,000 posts/month
- \$700 for 100,000 posts/month
- \$4,000 for 1,000,000 posts/month



Search Topics

Microsoft Social Engagement Search Setup

Summary Blocked Content

Surface (FI)

SEARCH TOPIC SETTINGS

Name: Surface (FI)
Category: Hardware
Owner: CRM System Created: 10/13/2015

RULES

Rule	Action
surface	

ADD RULE

Choose the type of search rule to configure.

- Keywords rule** The keyword search rule allows you to set up a search query with keywords, inclusions, and exclusions, as well as choosing in which languages and on which sources to search. For example, if you use Microsoft, MSFT as keywords, and CRM as inclusions, you'll get posts that contain Microsoft OR MSFT AND CRM.
- Facebook pages rule** The Facebook page rule allows you to capture all conversations on a public Facebook page. The conversations are captured regardless of any previously defined keyword search rule in the same search topic.
- Twitter rule** The Twitter rule allows you to track the conversations for a specific Twitter profile. The Twitter profiles are captured regardless of any previously set keyword search rule in the same topic.
- Private messages rule** You can acquire private messages from authenticated Twitter and Facebook Accounts when (i) a Facebook or Twitter Profile is authenticated on the Social Profiles page; and (ii) the acquisition of private messages has been enabled by the owner of the profile.

Topics consist of rules for either keyword search or specific FB page / Twitter profile

ACTIVE RULE

Blogs
 Twitter
 Videos
 News

News coverage is limited to the following languages: English, French, German, Spanish, and Portuguese.

You have the right to reproduce, display and distribute copyrighted News for your internal business purposes only, and shall not modify or publicly display copyrighted News.

Languages 1/4

SELECT ALL

English
 Finnish
 German
 Swedish

Keywords
surface

Keyword rules are targeted to sources & languages, with sets of keyword inclusion/exclusion rules



Social Profiles

Microsoft Social Engagement ≡ Settings

Personal Settings Global Settings User Management Connections Allowed Domains

OWNED PROFILES ⊕ ADD PROFILE ⊖ CHECK TOKENS ×

Profile	Type	Acquisition	Sharing	Owners
 @jukkan	 Profile	0	1	
 @msdyncrmfi	 Profile	1	1	
 Jukka Niiranen	 User	0	1	

SHARED PROFILES

Profile	Type	Acquisition	Sharing	Owners
PROFILES WITHOUT OWNERS				

Authorize MSE to post from your Twitter & FB profiles

Authorize other MSE users to posts as shared profiles

TWITTER PROFILE

@msdyncrmfi

Acquisition of private messages

▷   Active

Sharing

Select users

Add

User name

SELECT ALL

-  Alicia Thomber
-  Allie Bellew
-  Amy Alberts
-  Anne Weiler
-  Carlos Grilo
-  Christa Geller
-  CRM System



Analytics: overview

Microsoft Social Engagement Analytics Jukka Niiranen
Products Overview Conversations Sentiment Location Sources Month 10/11/2015 - 11/10/2015 5.8k posts

Analyze post data via 5 preconfigured dashboards

VOLUME
Volume Average

11 Oct 14 17 20 23 26 29 04 07 10

TOPICS BY SENTIMENT

Topic	Change
#MSDYN	+8.3
Dynamic...	+9.2
Dynamic...	+5.4

LOCATION INSIGHTS

SOURCES

Source	Count
Twitter	5,737
Facebook	84

AUTHORS

Author	Count
inogic (Inogic)	429
DynCRMJobs (MS Dynamics C...	205
CristinaFritz (Cristina Fritz Gom...	137
MSDynamicsCRM (MicrosoftDy...	122
intelligentcrm (IntelligentCRM)	114

PHRASES

SEARCH TOPICS

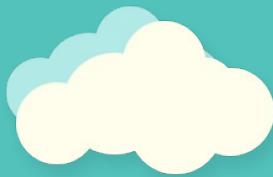
Topic	Count
Dynamic...	173
Dynamic...	84

LANGUAGES

Language	Count
English	5,814
German	4
Finnish	4

Download data to Excel

Drill into charts for details



Analytics: posts & filters

Microsoft Social Engagement Analytics

Jukka Niiranen
Contoso Social

Products

Overview Conversations Sentiment

Posts

1 filter

EXPAND ALL

Keywords 1

add keywords

social

Sources

Languages

SELECT ALL

English

Finnish

German

Swedish

(i) Sentiment is available English, Finnish, German, Swedish

Sentiment

Sentiment status

Reach

(i) Reach is available for Twitter and News

SELECT ALL

5 (Highest reach)

4 (High reach)

Month 10/11/2015 - 11/10/2015 58 posts

Positive 21:26, 11/05/2015
"to Win With Social Selling"

0:14, 11/11/2015

No more posts to show

Drill into stream of matching posts

Filter analysis data set by keyword, source, language, sentiment, reach, location...



Social Center

Microsoft Social Engagement Social Center

Jukka Niiranen
Contoso Social

#MSDYNCRM

MicrosoftDynamics... We're excited for the future of Microsoft Dynamics 365, but we're especially looking forward to learning and real-time dashboards! #MSDYNCRM

Ledgewise Pa... 9 Tips to Improve CRM User Adoption After Go-Live <https://t.co/n29zfNWkSj> #UserAdoption #CRM #salesforce #MSDynCRM

Jukka Niiranen... 57 min This looks like a very feature rich editable grid for #MSDYNCRM: <https://t.co/qgFvgQxnGQ> - Download from #CodePlex <https://t.co/TAdgJyQJu>

Jukka Niiranen... 1 hr This looks like a very feature rich editable grid for #MSDYNCRM: <https://t.co/qgFvgQxnGQ> - Download from #CodePlex <https://t.co/TAdgJyQJu>

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Surface

Configure personal set of post streams to follow

Surface

2 hr

5 hr

6 hr

1 day

Surface Hub on jäättää kokonaisuus. Tuottavuustyökalu isolla T:llä. Näitä saat @AteaFinland tammikuusta lähtien! <https://t.co/Artp1cJr53>

Ville @willie_d... @semi_rella surface 3 on varsin pätevä windows tabletti/hybridti Akku kestää, kevyt ja mobiili. Tosin näppäimiksen kera sillekin kertyy hintaa.

gankogankog... Kyllä, meillä on järvenpinta. Mihin torstaina kello

Pasi Vahimaa ... Kappas, Apple on omistunut kopioimaan Surface Pron, joka jo pitkään ollut minun ainoana koneena. <https://t.co/lmHhalPOFK>

http://www.yo...

Stream Settings

Name: @MSDYNCRMFI Owner: Jukka Niiranen

Color: yellow Sorting: Date Published

Sharing: No users selected Add Users

Shared with all users

Streamed data

0 filters

EXPAND ALL

Keywords

Sources

Languages

SELECT ALL

English

Configure personal set of post streams to follow

Filter stream content, share streams with other users



Activity Map

#MSDYNCRM

Area filter -24h Now Buzz map Sentiments

-24h Now Past 24 h 20 P

80 posts

Show live
buzz/sentiment map
of posts from last
30min – 24h

PHRASES

#crm #msdynCRM four acquisitions scripting
also dynamics CRM CRM make online
client #CRM #msdynCRM blog using
get release via awesome microsoft yes
will data microsoft dynamics CRM

INSIGHTS <

> POSTS

UNITED STATES

MEXICO

Microsoft Social Engagement

bing

(-)

(+)

SWEDEN FINLAND
NORWAY
BELARUS POLAND
GERMANY FRANCE
ITALY SPAIN
TURKE
ALGERIA
EGYPT
MAURITANIA
MALI
NIGER
CHAD

© 2015 Microsoft Corporation © 2015 HERE

Inogic @inogic 7 min
Want to get hands on experience in Dynamics CRM? Just Sign up & Start Exploring <https://t.co/deMhzreuwk> #MSDYNCRM

Kerry Rosvol... 7 min
Yes, #msdynnav can connect to #msdynCRM AND it can automatically update exchange rates
#directions #navug #crowdgoeswild

slowcrm (Slow... 40 min
Insert data into N:N relationship with drag and drop listbox <http://t.co/xenBRuwlMj>
#MSDYNCRM by @ankit007 shah <http://t.co/La30ICmlr>

Retweeted by CRM Consultants @crmcon...

JoelLindstrom... 40 min
Read and vote for the #MSDYNCRM mobile connect items in @scottsewell manifesto
<https://t.co/Jp7smcRlh>

Retweeted by CRM Consultants @crmcon...



Alerts

Microsoft Social Engagement Message Center

ALERTS

#MSDYNCRM trending

@MSDYNCRMFI

Set up trend or post alerts for specific searches or accounts

ALERT DETAILS

Name: **@MSDYNCRMFI** Status: **Active**

Alert Type: **Post Alert**

No duplicates

Recipients: Please be aware that you might be sharing confidential information outside of Microsoft Social Engagement.

Email recipients: **1** **@gmail.com**

Data Sources: **@MSDYNCRMFI**

No filters

Microsoft Social Engagement

Post Alert

This alert was triggered in the following Microsoft Social Engagement solution: [Contoso Social](#)

Alert **@MSDYNCRMFI** – 1 posts

Recent posts matching your filters:

Twitter Finnish Teppo Testaaja @TesTeppo
<http://twitter.com/TesTeppo/statuses/656828015259832320>

Unknown sentiment **@msdyn.crmfi** Onko mitään virallisempaa tietoa tästä aiheesta?

@msdyn.crmfi Onko mitään virallisempaa tietoa tästä aiheesta?

If you don't want to receive this alert, contact the owner of this alert: [Jukka Niiranen](#).

Deliver email notifications to specific addresses when alert criteria is met



MSE feature development

- MSE is currently adding new features with a monthly release cadence
 - 2015 Update 1.2 (<http://bit.ly/mse15u12>): link social posts to CRM
 - 2016 Update 1 (<http://bit.ly/mse16u1>): create new posts, not just replies
- More social channels coming in future releases, incl. custom sources via RSS
 - Currently only Facebook & Twitter supported
- More sentiment languages continuously added
 - Currently 20 for search language, 15 for sentiment analysis
- Keep an eye on the "What's New" page for Social Engagement at <http://bit.ly/msenew>
- Read about MSE 2016 roadmap from "Get Ready" page for Dynamics CRM at <http://bit.ly/crmnext>



MSE 2016 roadmap items

NEW TWEET

send as crmteam

Message

Are you ready for a new world of technology? News and updates from Nokia.

Photos (2)

Send and close Send

Create new posts,
not just replies

Microsoft Social Engagement | Analytics

Back to Dynamics CRM

AUTHOR DETAILS

Nokia USA @NokiaUS Sunnyvale, CA company.nokia.com

FOLLOW

Are you ready for a new world of technology? News and updates from Nokia.

FOLLOWERS 30,496 FOLLOWING 4,545 TWETS 411 IMAGES 17

Header Picture

ACTIVITY IN THE PAST 30 DAYS

Volume

Tweets

View
author
profiles

Microsoft Social Engagement | Social Selling

Dynamics CRM

CUSTOMER AND COMPETITIVE INSIGHTS

Customer: Blue Yonder just posted seconds ago

Competitor: Skylabs connected on Facebook with Lead: Beaver Lake

msn.com article: bc news update Lead: Skylabs posted today

NEW LEADS

Michael Posts: Azure, Purchase, compare is following Contoso

Alicante Trabaja Posts: Interest, Azure followed by Customer: Skylabs

Kelli Posts: Cloud, compare, interest trending post on Blue Yonder

SOCIAL METRICS

Growing your network

72 +15% 0 100%

Engaging your network

45 +2% 0 100%

MESSAGES POSTED 2245 OK 25727 POST 46 IMPRESSIONS

MESSAGES POSTED 2245 OK 25727 POST 46 IMPRESSIONS

TRENDING PHRASES

products b2b dynamics microsoft live

crm surface center trials

marketing popular developer services today

INCREASE YOUR NETWORK

Michael @magentoserver Michael Pucher @mpucher_CRM

Alicante Trabaja @AlicanteTrabaja HR Hr Jason Carter

Social Selling app
for sales users

SELECT ALL CHANGE LABEL ASSIGN EDIT SENTIMENT REMOVE

CortanaBot @cortanabot 10 questions for Cortana, Siri, Amazon Echo and Google Now <http://t.co/m0fEmDIE2> 58 min assign to Traged

thefedoraus Windows 10 defaults to keylogging, harvesting browser history, purchases, and covert listening hushicho: wilhelstein : mostlysignsreports : By default, Microsoft gets to see your location, keystrokes and browser history – and listen to your microphone, and some of that stuff is shared with “trusted [by Microsoft, not by you] partners

36 min assign to Under Review

Brent Manhart @TheBrentCharles I really thought “fighting robots” would be cooler than me struggling to get Siri and Cortana to share pictures. 42 min assign to Traged

Automatic
tagging of
posts

MSE and CRM Integration





Connecting MSE to CRM

- Integration used for pushing social posts & profiles to CRM
- Currently only CRM Online 2015 Update 1 supported, on-prem support coming with 2016
 - Must be in same tenant as MSE if Online
- One MSE can talk to multiple CRM instances
 - One instance can be set as default to linked posts

The screenshot shows the MSE interface with the following details:

- Header:** Microsoft Social Engagement, Personal Settings, Global Settings, User Management, **Connections** (highlighted in blue), Allowed Domains, Jukka Niiranen, Contoso Social, profile icon, settings gear.
- MIDDLE SECTION:** **MICROSOFT DYNAMICS CRM CONNECTIONS**
 - Establish a connection between Microsoft Social Engagement and Microsoft Dynamics CRM. This allows users to create and access Dynamics CRM records from within Social Engagement.
 - Table:

Name	CRM instance	Link posts	Language	Default state
Contoso	di201510us.crm.d...	✓	English	✓
- RIGHT SECTION:** **ADD CONNECTION**
 - Connection type: CRM (On-Premises) (selected), CRM Online (highlighted in blue), North America (dropdown).
 - CRM Instance: https:// (input field).
 - Name: (input field).



Connecting CRM to MSE

- Integration used for showing embedded widgets from MSE in CRM forms and dashboards
- Supports both CRM Online and on-premises, starting from CRM 2015
- Only user interface level "integration", CRM doesn't send any data back to MSE



Microsoft Social Engagement configuration

Connect Microsoft Dynamics CRM to your Microsoft Social Engagement solution. With Microsoft Social Engagement, you can get in-context social insights.

Select the Microsoft Social Engagement solution to connect to:

Contoso Social (9975)

This will delete all existing data in CRM regarding search topics, search topic categories, and visuals for any Social Insights configured on forms and dashboards.



Social Profiles in CRM

- Created by MSE the first time you link a social post into CRM
- Cannot be created in CRM manually
- Are not matched to existing CRM contacts, duplicate contacts need to be manually merged
- Customer is always contact, not account

Microsoft Dynamics CRM | Service | Social Profiles | TesTeppo | ...

CONNECT | DEACTIVATE | DELETE | ASSIGN | EMAIL A LINK | SHARE | ...

SOCIAL PROFILE
TesTeppo

Social Channel: Twitter | Influence Score: 10,00 | Owner: Jukka

SOCIAL PROFILE

Profile Name *	TesTeppo
Profile Link	http://www.twitter.com/TesTeppo
Blocked	No
Customer *	Teppo Testaaja

CASES

Case Title ↑	Status	Case Number	Created On
@msdynrmfi Onko mitään virallisempaa tietoa tästä ...	Active	CAS-00037-R5T5Q2	21.10.2015 16:51
Eikö Surface Book tule lainkaan saataville suomalaisell...	Active	CAS-00036-X6Q5S3	20.10.2015 22:53

RELATED SOCIAL PROFILES

Profile Name ↑	Customer	Social Channel	Influence Score	Blocked
TesTeppo	Teppo Testaaja	Twitter	10,00	No



Social Activities in CRM

- Created by MSE every time you use Link-to-CRM feature
- Cannot be created in CRM manually
- Contain both the post attributes (post text, date, channel, social profile) as well as JSON payload with more channel specific properties

Microsoft Dynamics CRM | ≡ Social | Social Activities | ▼

trash DELETE convert convert to queue ADD TO QUEUE assign ASSIGN queue item QUEUE ITEM DETAILS

SOCIAL ACTIVITY

I've just seen the #Salesforce Lightn.

Priority	Sentiment Value	Activity Status	Social Channel
Normal	0,00	Completed	Twitter

Title I've just seen the #Salesforce Lightn.
Posted By leontribe
Posted On 4.11.2015 19:28
Posted To --
Received As Public Message
Post URL <http://twitter.com/leontribe/status/628111111111111111>

Post Description

I've just seen the #Salesforce Lightning Experience. Talk about imitation being the sincerest form of flattery. Take pride #msdynCRM team

Regarding Leon Tribe
Created On 5.11.2015 1:01
Modified On 5.11.2015 1:01
Owner* Jukka Niiranen

More Info

Additional Parameters

```
{"targetEntityName": "socialactivity", "userPreferredTargetEntity": "lead", "socialHandle": "leontribe", "profileName": "leontribe", "profilelink": "http://www.twitter.com/leontribe", "fullName": "leontribe", "community": 2, "influencescore": 48.0, "notes": "Salesforce customers about to get exposed to best of Dynamics CRM features? Worth a call!", "isRetweet": false, "MSEbacklinkPost": "https://listening-prod.dynamics.com/app/9975/#postid=9733"}
```



Social Activities in CRM (2)

CONTACT ▾
Teppo Testaaja ▾

Summary

CONTACT INFORMATION

Full Name *	Teppo Testaaja
Job Title	--
Account Name	--
Email	--
Business Phone	--
Mobile Phone	--

POSTS ACTIVITIES NOTES

All | Add Phone Call Add Task ...

 @msdynCRMfi Onko mitäään virallisempaa tietoa tästä aih...
Posted by TesTeppo 21.10.2015 16:51
Sentiment Value 0 Posted As Public Message

 Eikö Surface Book tule lainkaan saataville suomalaisella n...
Eikö Surface Book tule lainkaan saataville suomalaisella näppäimistöllä? Voihan "ÄäÖöÅå" ...
Post URL <http://twitter.com/TesTeppo/statuses/656540987557302272>
Posted by TesTeppo 20.10.2015 22:53
Sentiment Value 0 Posted As Public Message

Shown in standard activity views related to the contact, including rollup to parent account's activity history

Microsoft Dynamics CRM | Sales | Activities | ...

SEARCH CRM DATA

TASK EMAIL APPOINTMENT | PHONE CALL LETTER FAX SERVICE ACTIVITY ...

Received Social Activities

All Activities Task Fax Phone Call Email Letter Appointment Service Activity Campaign Response Campaign Activity Recurring Appointment Social Activity

System Views All Social Activities Failed Social Activities My Facebook Social Activities My Twitter Social Activities Processing Social Activities Received Social Activities

Search for records

Social Channel	Posted By	Sentiment Value...	Regarding
Twitter	slowxrm	0,00	Slow xrm via Twitter on 11.11...
Twitter	jon_rivers	0,00	Jon Rivers via Twitter on 10.11...
Twitter	nzCRMguy	0,00	Mark Smith via Twitter on 9.11...
Twitter	AndrewBibby	1,00	Andrew Bibby
Twitter	leontribe	0,00	Leon Tribe
Twitter	sirjameswood	0,00	James Wood
Twitter	nzCRMguy	0,00	Mark Smith via Twitter on 4.11...
Twitter	carsten_msc...	1,00	Carsten Groth via Twitter on 4...

Can be directly accessed from standard activity menus, to query social activities across different customers



Linking MSE posts to CRM

Microsoft Social Engagement Analytics

#MSDYNCRM 1

Overview Conversations Sentiment Location Sources

POSTS

SELECT ALL CHANGE LABEL ASSIGN EDIT SENTIMENT REMOVE

India 1:00, 11/15/2015

Inogic @inogic
Introduction of Rollup Fields in CRM 2015
<https://t.co/DE02EW6pfR> #MSDYNCRM

United Kingdom 0:51, 11/15/2015

Ramón Tébar Bueno
@ramontabar
London, United Kingdom

Metro Bank and Microsoft Dynamics. #msdynCRM, #microsoft, @metro_bank, @MSFTDynamics, @MSDynamicsCRM <https://t.co/sutqOyGRir>

REPLY RETWEET FAVORITE

REMOVE

ASSIGN TO SET LABEL LINK TO CRM

United Kingdom 0:51, 11/15/2015

Ramón Tébar ...
Metro Bank and Microsoft Dynamics. #msdynCRM, #microsoft, @metro_bank, @MSFTDynamics, @MSDynamicsCRM <https://t.co/sutqOyGRir>

India 0:50, 11/15/2015

Inogic @inogic
#MSDYNCRM – Quick Fix for #VALUE! Errors in Exports to Excel by @CRMSoftwareBlog
<https://t.co/xgymJEsibX> <https://t.co/FgEO3DNbc2>

United States 0:42, 11/15/2015

Catapult Syste...
Miss this week's webinar on @MSDynamicsCRM? Not to worry, we have 2 webinars remaining in the series! <https://t.co/X8o8AQwTYD> #MSDYNCRM

United Kingdom Neutral 0:51, 11/15/2015

Ramón Tébar Bueno
@ramontabar
London, United Kingdom

Metro Bank and Microsoft Dynamics. #msdynCRM, #microsoft, @metro_bank, @MSFTDynamics, @MSDynamicsCRM <https://t.co/sutqOyGRir>

REPLY RETWEET FAVORITE

REMOVE

ASSIGN TO SET LABEL LINK TO CRM

Create record in Microsoft Dynamics CRM

Automatically create records from the current post.

Instance
Contoso

Entity
Lead

Notes
Metro Bank heavily investing in Microsoft technologies. We should get in contact with them to check their plans for Power BI & Stream Analytics.

Create

Open the post, click "Link to CRM" (select CRM instance if more than one)

Choose target entity, e.g. lead, case

Enter free text notes (optional)

Click "Create" to send info to CRM



Example of new CRM lead created from MSE post

New contact +
social profile
created from the
post

New lead created
with post topic
and user notes
from MSE

Social post linked
to activity history
of lead, contact (+
account, if exists)

Microsoft Dynamics CRM | Sales | Leads | Ramón Tébar Bueno | Jukka Niiranen | Contoso |

+ NEW | DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE | ...

LEAD Ramón Tébar Bueno

Lead Source: Web, Rating: Warm, Status: New, Owner: Jukka Niiranen

Qualify (Active) → Develop → Propose → Close

Existing Contact? Ramón Tébar Bueno
Existing Account? click to enter
Purchase Timeframe click to enter

Estimated Budget click to enter
Purchase Process click to enter
Identify Decision Maker mark complete

Capture Summary: Metro Bank heavily invest

Summary

LEAD

Topic*: Metro Bank and Microsoft Dynamics. #msdyncrm, #microsoft, @m...

Description: Metro Bank heavily investing in Microsoft technologies. We should get in contact with them to check their plans for Power BI & Stream Analytics.

CONTACT

Name*: Ramón Tébar Bueno
Business Phone: --
Mobile Phone: --
Email: --

COMPANY

Company*: --

POSTS

Metro Bank and Microsoft Dynamics. ...
Metro Bank and Microsoft Dynamics. #msdyncrm, #microsoft, @m...
Post URL: <http://twitter.com/ramontebar/statuses/665663368498425856>
Posted by ramontebar Today
Sentiment Value 0 Posted As Public Message

ACTIVITIES

NOTES

STAKEHOLDERS

Name	Role
Ramón Tébar Bueno	Stakeholder

COMPETITORS

Name
No competitors found.



Choosing CRM entities available in MSE

Microsoft Social Engagement ≡ Settings

Personal Settings Global Settings User Management **Connections** Allowed Domains

CRM INSTANCE

CRM instance: `crm.dynamics.com` Organization language: Connected on:

Name: `Contoso`

Set as default ⓘ

Enable instance ⓘ

RECORD DETAILS

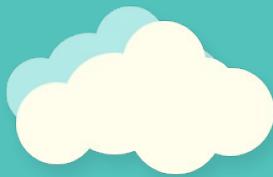
Display Name	Record Form	Description
Case	<input checked="" type="checkbox"/>	Service request case associated with a contract.
Lead	<input checked="" type="checkbox"/>	Prospect or potential sales opportunity. Leads are co...
Signal	<input checked="" type="checkbox"/>	

SELECT ENTITIES

- Office Groups Meetings Cache Info `msdyn_officegroup:`
- Office Groups Members Cache Info `msdyn_officegroup:`
- Office Groups Photo Cache `msdyn_groupspivot`
- Opportunity Potential revenue-generating even... `opportunity`
- Order Quote that has been accepted. `salesorder`
- Profile Album Contains user profile images that a... `msdyn_postalbum`
- Quick Campaign System operation used to perform ... `bulkoperation`
- Quote Formal offer for products and/or s... `quote`
- Service Activity that represents work done ... `service`
- Signal `new_signal`
- Social Profile
- System Job
- Team
- User

You can enable/disable CRM instance specific entities to be available in the "Link to CRM" dialog for MSE posts

MSE social posts can be converted to many default and all custom CRM entities



Configuring fields available across MSE and CRM

Microsoft Social Engagement ≡ Settings

Personal Settings Global Settings User Management **Connections** Allowed Domains

CRM INSTANCE

CRM instance: crm.dynamics.com

Name: Contoso

Set as default ⓘ

Enable instance ⓘ

RECORD DETAILS

SELECT ENTITIES

Display Name	Record Form	Description
Case	<input checked="" type="checkbox"/>	
Lead	<input checked="" type="checkbox"/>	
Signal	<input checked="" type="checkbox"/>	

ENTITY DETAILS

Display Name: Lead Unique Name: lead

Description: Prospect or potential sales opportunity. Leads are converted into accounts, contacts, or opportunities when they are qualified. Otherwise, they are deleted or archived.

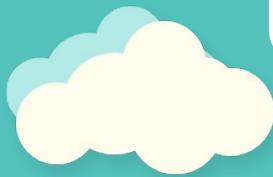
Define record details form for Dynamics CRM entities
To define the information to be shown in the record details form, select the CRM attributes that are available for this entity.

Topic	▼	▼ X
Name	▼	↑ ▼ X
Company Name	▼	↑ ▼ X
Rating	▼	↑ ▼ X
Status	▼	↑ ▼ X
Created On	▼	↑ ▼ X
Lead Source	▼	↑ ▼ X
Owner	▼	↑ X

ADD MORE

You don't configure the field mapping from MSE to CRM here, instead you'll leverage CRM Record Creation Rules

What you can specify in MSE is what fields from the CRM entity should be shown in the preview when viewing the linked record via MSE UI



Using CRM Record Creation Rules

- MSE will only ever create Social Profiles & Social Posts to CRM
- All the business logic for creating other records is managed in CRM via Record Creation and Update Rules
 - First introduced as "Case Creation Rules" in CRM 2013 SP1
 - Expanded into general purpose rules in CRM Online 2015 Update 1

Microsoft Dynamics CRM | ≡ Settings | Service Management

Service Management

Set up customer service for your organization.

Case Settings with Record Creation and Update Rules

 **Queues**
Create and manage service queues, and manage the membership of private queues. Establish criteria for automatic record creation and updates.

 **Parent and Child case settings**
Specify the information to be inherited from a parent case to child cases. Define case closure cascade settings between parent and child cases.

 **Routing Rule Sets**
Create or delete case routing rules. Change existing rule information, such as conditions, order, and actions.

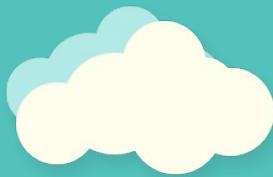
 **Automatic Record Creation and Update Rules**
Create and manage rules for automatic record creation and updates. You can set up rules for either out-of-the-box entities or custom entities.

Microsoft Dynamics CRM | ≡ Settings | Service Management

+ NEW DELETE | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL

→ All Record Creation and Update R... ▼ Search for records

✓	Name ↑	Status	Source Type	Queue	Channel Property Group	Cr	▼
	Another test rule	Draft	Social Activity				
	Email to case rule	Draft	Email				
	Tweets to Records	Active	Social Activity		MSE Posts		



Configure your Record Creation Rules

- Choose source activity type
 - Emails & Social Activities have specific built-in conditions available
- Configure Channel Properties
 - Process additional parameters of the source activity record
- Add & order Record Creation Details (= Rule Items)
 - Execute the business logic for target records to create & other processes (workflows)

Microsoft Dynamics CRM | ≡ Settings | ▼ Service Management

+ NEW ✓ ACTIVATE DELETE ASSIGN EMAIL A LINK ... ↑ ↓ ☰

RECORD CREATION AND UPDATE RULE
Tweets to Records ≡

! This rule is inactive. Records won't be created for activities added to the specified queue.

<p>Name *</p> <p>Source Type *</p> <p>Queue</p> <p>Owner *</p>	<p>Tweets to Records</p> <p>🔒 Social Activity</p> <p>--</p> <p>Jukka Niiranen</p>
---	--

CHANNEL PROPERTIES

Additional Properties MSE Posts ☰

SPECIFY CONDITIONS FOR RECORD CREATION

Create records for blocked social profiles

Create records for private messages only

SPECIFY RECORD CREATION AND UPDATE DETAILS

↓ ↑ +

Name	<hr/>
Tweet to Lead	
Tweet to Case	
Tweet to Signal	



Configuring Channel Properties

- Channel Properties will be available for the business logic in your record creation rules
- You must "parse" them from the Social Activity Additional Parameters field (JSON payload)
- Examples:
 - *userPreferredTargetEntity* = entity chosen by MSE user in "Link to CRM" dialog
 - *notes* = text entered by MSE user

CHANNEL PROPERTY GROUP
MSE Posts

Name *	MSE Posts	Created On
Source Type *	Social Activity	

Channel Properties

Name ↑	Data Type	Application Source	Description
userPreferredTargetEntity	Single Line Of Text	MSE	Record type to create
notes	Single Line Of Text	MSE	Notes added by the MSE user when linking post to CRM

Additional Parameters

```
{"targetEntityName":"socialactivity","userPreferredTargetEntity":"lead","socialHandle":"ramontebar","profileName":"ramontebar","profilelink":"http://www.twitter.com/ramontebar","fullName":"Ramón Tébar Bueno","community":2,"influencescore":46.0,"notes":"Metro Bank heavily investing in Microsoft technologies. We should get in contact with them to check their plans for Power BI & Stream Analytics.", "isRetweet":false,"MSEbacklinkPost":"https://listening-prod.dynamics.com/app/9975/#postid=25313"}
```

CHANNEL PROPERTY
New Channel ...

Name *	influencescore
Data Type *	Floating Point Number
Application Source	MSE
Description	Klout score of post author



Configuring Record Creation Rule Items

- Rule Items evaluate a condition against the source activity
 - E.g. "did the user choose this social post to be created as a Case entity record?"
- If Rule Item condition is met, the actions are performed
 - E.g. create a case, send email notification, start child workflow process to evaluate more complex business logic

Record Creation and Update Rule Item

Tweet to Case

General

Name *

Condition

Clear | Group AND | Group OR

Channel Properties userPreferredTargetEntity Equals incident

Select

ACTIONS

Add Step | Delete this step.

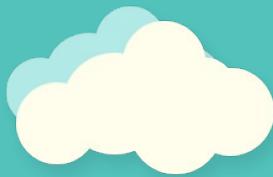
Create: Case Set Properties

SPECIFY OTHER ACTIONS

Add Step | Delete this step.

Start child workflow: Create (Case) Evaluate case priorit

Setting Regarding of a record? [What you need to know](#)

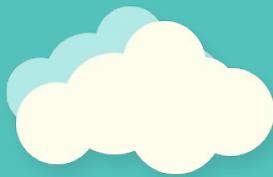


Current limitations with MSE-CRM integration

- “Link to CRM” in MSE will always create a new record, can’t link to existing records in CRM
 - E.g. Case created into CRM will only show the first social post, not replies & discussion threads
 - No option to link just a new Social Activity to an existing Social Profile without creating a new Regarding record in the process
- Social Profiles are matched only against existing profiles, not existing contacts
 - Profiles are not linked to existing customer records until you merge the new duplicate contacts created by MSE in CRM

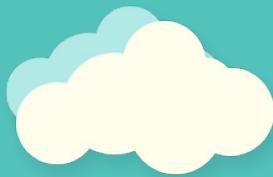
MSE and CRM Customization





Social Post & Profile entities customizability

- Can add new fields and views
- Can customize forms
 - Can't create additional forms
- Can have charts and appear on dashboards
- Can be accessed via workflows
- Can be used in Phone & Tablet client



Social Profile viewed on CRM Tablet client



← TesTeppo

Relationships



27/27

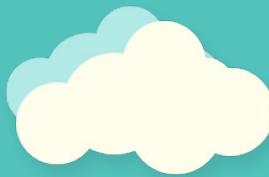
Social Profile

🔒 Social Channel	Twitter
🔒 Influence Score	10,00
Owner *	Jukka Niiranen
Profile Name *	TesTeppo
Profile Link	http://www.twitter.com/ TesTeppo
Blocked	No
Customer *	Teppo Testaaja

Cases

@msdyncrmfi Onko mitään
virallisempaa tietoa tästä
Active
CAS-00037-R5T5Q2
21.10.2015 16:51

Eikö Surface Book tule lainkaan
saataville suomalaisella
Active
CAS-00036-X6Q5S3
20.10.2015 22:53



Social data viewed via dashboard on Tablet client

dashboards

SEARCH

Social Data

Received Social Activities

TOP 10 POSTS BY AUTHOR

Post Author	Count
Mitch Milam	1
Guido Pr...	1
Guido Pr...	1
Microsof...	2
Teppo Te...	2
Gus Gonz...	2
David Pe...	2
Craig Ha...	2
Jon Rivers	3
Mark Smith	6

Active Social Profiles

TOP 10 INFLUENCE SCORES

Customer	Influence Score
Gus Gonz...	47,00
Andrew B...	48,00
Leon Tribe	48,00
Inogic	48,00
Carsten ...	52,00
David Pe...	52,00
Brian Ga...	53,00
Jon Rivers	59,00
Jukka Ni...	60,00
Mark Smith	65,00

Social Profile Contacts, Unpr...

+

Receiving

SOCIAL CHANNELS

Contact	Timestamp	...
James Wood	5.11.2015 0:59	---
Andre K Margono	4.11.2015 2:43	---
Adam Vero	4.11.2015 2:16	---
Carsten Groth	4.11.2015 2:13	---
Microsoft Dynamics	29.10.2015 22:41	---
Joel Lindstrom		...

CountAll (Post ID)

...



Social dashboard options

- Using CRM-to-MSE integration
 - Embed Social Insights widgets to create a search topic specific dashboard
 - Data loaded from MSE, license required, drill through to MSE
- Using MSE-to-CRM integration
 - Build new view filters and charts for Social Profile and Social Activity entities
 - Combine with any related entity, available to all CRM users, drill down

Set up Social Insights

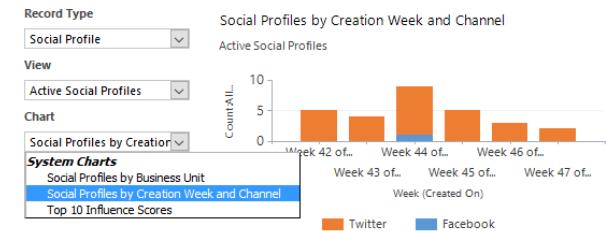
Set search topic type Set topic or category Select visuals

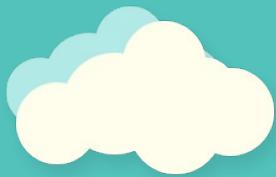
CATEGORY NAME: Products

Visual name	Description	Sample
1 Analytics summary	Get a quick summary of the number of posts, how your se...	
2 Buzz	Check the buzz on your search topic or category. See the total...	
3 Languages	See the top 5 languages with the most posts about your search...	
4 Locations	See where your posts are coming from.	

Add Component

Choose the component that you want to add to the dashboard.





Social dashboard for MSE widget data

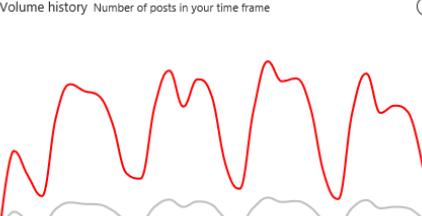
Microsoft Dynamics CRM | ≡ Social | Dashboards | ⋮ ⌚ ⊕ 🔍 Search CRM data ✖ 👤 ✉ 🔗 👤 Jukka Niiranen
Contoso 👤 👤 ⚙️ ?

SAVE AS NEW REFRESH ALL

Social Analytics ⋮

PRODUCTS

Volume history Number of posts in your time frame ⓘ



Microsoft Social Engagement

PRODUCTS

Top 5 authors ⓘ

Author	Posts	Percentage	Actions
inogic (inogic)	507	7.6%	↗
DynCRMJobs (MS Dynamics CRM Jobs)	232	3.5%	↗
CristinaFritz (Cristina Fritz Gomez)	150	2.2%	↗
Microsoft Social Engagement	115	1.8%	↗

PRODUCTS

Recent posts ⓘ

Author	Post	Time	Language	Actions
inogic	Theme your Dynamics CRM 2015 to Custom Solution https://t.co/6A9YgFOlw...	23:30	11/14/2015	EN ↗
Darrell Tunnell	Announcing the first release of CrmCross! A portable #MSDYNCRM SDK! Use...	23:15	11/14/2015	EN ↗
Marco Amoedo	Check out the first infographic from the @CRMUGUK London Chapter meetin...	23:02	11/14/2015	EN ↗
Microsoft Social Engagement	Microsoft Social Engagement			↗

PRODUCTS

Sources ⓘ



6,702 posts

PRODUCTS

Languages share of voice In percentage per language ⓘ



Language	Share of Voice
English	7.5k
German	5k
Finnish	2.5k
Swedish	0k

PRODUCTS

Sources summary ⓘ

Source	Posts	Percentage	Actions
Blogs	0 Posts	0 %	↗
Facebook	102 Posts	1.5 %	↗
Twitter	6,600 Posts	98.5 %	↗



Social dashboard for CRM data

Microsoft Dynamics CRM | ≡ Social | Dashboards | ▼

SAVE AS NEW REFRESH ALL

Social Data ▼

what's new grid

Enter post here

All records ▼ Both Auto posts User posts

Slow xRM via Twitter on 11.11.2015 22:18

New signal from Slow xRM on Twitter: Microsoft Dynamics CRM Service Built to Handle IoT <https://t.co/lzY4JrbPDN> #MSDYNCRM by @EMorphy
On Slow xRM via Twitter on 11.11.2015 22:18's wall
11.11.2015 22:18

Slow xRM

Contact: Created By Jukka Niiranen.
On Slow xRM's wall
11.11.2015 22:17

Jon Rivers via Twitter on 10.11.2015 21:28

New signal from Jon Rivers on Twitter: Make plans to attend the 2016 Microsoft Dynamics Technical Conference.
<https://t.co/kNOUq85ngm> #MSDYNAX #MSDYNCRM #AX7
On Jon Rivers via Twitter on 10.11.2015 21:28's wall
10.11.2015 21:29 · You like this

Jukka Niiranen

Now there's an event I'd surely want to attend!
10.11.2015 21:57

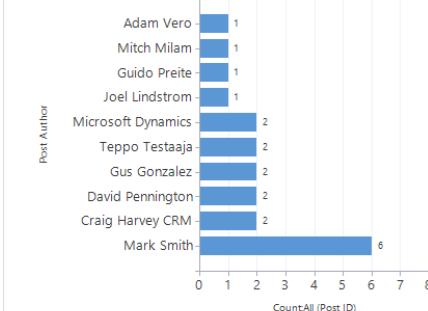
Social Profile Contacts, Unprocessed ▼

Search for records grid

Created On ↑	Full Name	Email	Company Name	Business Phone	Owner	Address 1: City	Address 1: Zip
15.11.2015 15:08	Ramón Tébar Bueno				Jukka Niiranen		
11.11.2015 22:17	Slow xRM				Jukka Niiranen		
10.11.2015 21:27	Jon Rivers				Jukka Niiranen		
9.11.2015 22:19	Andrew Bibby				Jukka Niiranen		
5.11.2015 05:59	James Wood				Jukka Niiranen		
4.11.2015 2:43	Andre K Margono				Jukka Niiranen		
4.11.2015 2:16	Adam Vero				Jukka Niiranen		
4.11.2015 2:13	Carsten Groth				Jukka Niiranen		

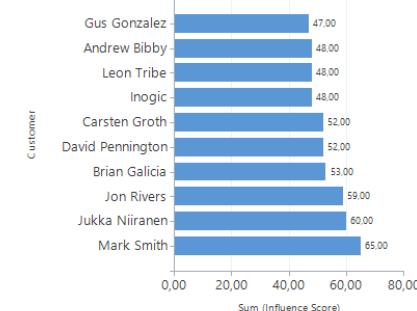
Top 10 Posts by Author

Received Social Activities



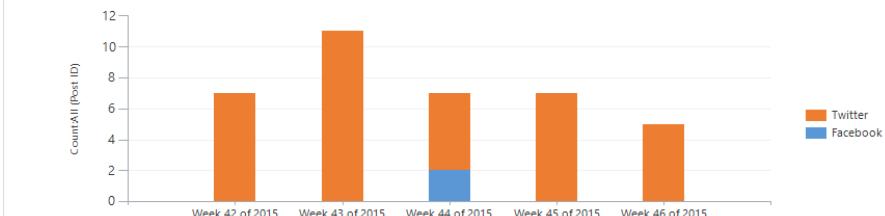
Top 10 Influence Scores

Active Social Profiles



Social Posts by Creation Week and Channel

Received Social Activities





Custom entity for tracking social posts

- For non-service scenarios, every relevant customer tweet is not going to be a lead
- To use Link-to-CRM you need to always choose some entity, though
- If you want to track important social posts related to customers, partners or competitors into your CRM contacts database, you can create a custom entity, like "Signal"
- Choose this when linking tweets & FB posts into CRM contacts as records in their activity history
- Leverage CRM workflows to populate fields, process user notes, send notifications...



Social Signals in CRM

Microsoft Dynamics CRM | Ⓜ Sales | Signals |

+ NEW EDIT ✓ ACTIVATE ⚡ DEACTIVATE ⚡ DELETE | ⚡ ASSIGN SHARE ...

Active Signals ▾

Search for records

Created On	Name	Contact	Account	Social Channel	Comments
10.11.2015 21:28	Jon Rivers via Twitter on 10.11.2015...	Jon Rivers		Twitter	Upcoming conference for all Dynamics CRM & AX technical professionals.
✓ 9.11.2015 22:18	Mark Smith via Twitter on 9.11.2015...	Mark Smith	Dynamics CRM MVPs	Twitter	Make the most of your network data in CRM with this cool add-on!
4.11.2015 2:43	Andre K Margono via Twitter on 4.1...	Andre K Margono		Twitter	Fashion tips from the CRM MVP crowd :)
4.11.2015 2:33	Craig Harvey CRM via Twitter on 4.1...	Craig Harvey CRM		Twitter	CRM IFD & ADFS configuration tips
4.11.2015 2:16	Adam Vero via Twitter on 4.11.2015 ...	Adam Vero		Twitter	CRM 2016 loc
4.11.2015 2:14	Carsten Groth via Twitter on 4.11.2...	Carsten Groth		Twitter	Developer &
4.11.2015 2:13	Mark Smith via Twitter on 4.11.2015...	Mark Smith	Dynamics CRM MVPs	Twitter	Field One ne
29.10.2015 22:43	Microsoft Dynamics via Facebook o...	Microsoft Dynamics		Facebook	CRM custome
29.10.2015 22:42	Microsoft Dynamics via Facebook o...	Microsoft Dynamics		Facebook	Sales leaders!
29.10.2015 22:33	Gus Gonzalez via Twitter on 29.10.2...	Gus Gonzalez	Dynamics CRM MVPs	Twitter	MVP Summit
29.10.2015 22:30	Joel Lindstrom via Twitter on 29.10....	Joel Lindstrom		Twitter	Outlook clien

Latest signals can be viewed, filtered and searched

Microsoft Dynamics CRM | Ⓜ Sales | Signals | Mark Smith via Twitt... |

+ NEW ⚡ DEACTIVATE ⚡ DELETE ⚡ ASSIGN SHARE ⚡ EMAIL A LINK ⚡ FOLLOW ...

Mark Smith via Twitter on 9.11.2015 ...

General

Message *
"New version of Network Visualisations for Dynamics CRM"
#MSdynCRM <https://t.co/HanIcfTSF>

POSTS ACTIVITIES NOTES

Enter post here

Both Auto posts User posts



Mark Smith via Twitter on 9.11.2015 22:18
New signal from Mark Smith on Twitter: "New versio
#MSdynCRM <https://t.co/HanIcfTSF>
On Mark Smith via Twitter on 9.11.2015 22:18 's wall
Yesterday

Data from original social post copied to Signal field with workflow

MSE user notes also available for context & comments

URL
<http://twitter.com/nzCRMguy/statuses/663463592554033156>

Social Channel *

Twitter

Contact *

Mark Smith

Account

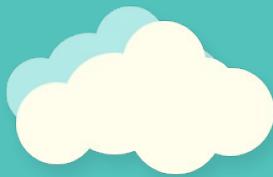
Dynamics CRM MVPs

Comments

Make the most of your network data in CRM with this cool add-on!

Owner *

Jukka Niiranen



CRM Activity Feeds for following social signals

- You can also leverage CRM Activity Feeds for automatic status updates on new Signals
- Use workflow process to create new AF post on the contact's wall
- All CRM users who follow these contacts will see the updates in their What's New home feed

Microsoft Dynamics CRM | ☰ Sales | ▾ What's New

NEW ACTIVITY | + NEW RECORD | IMPORT DATA

what's new

POST

All records | Both Auto posts User posts

 **Jon Rivers via Twitter on 10.11.2015 21:28**
New signal from [Jon Rivers](#) on Twitter: Make plans to attend the 2016 Microsoft Dynamics Technical Conference. <https://t.co/KNOUq85ngm> #MSDYNAX #MSDYNCRM #AX7
On [Jon Rivers](#) via Twitter on 10.11.2015 21:28 's wall
Today •  You like this

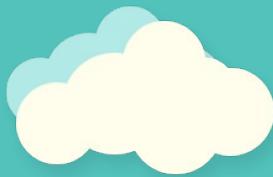
 **Jukka Niiranen**
Now there's an event I'd surely want to attend!
Today

 **Jon Rivers**
Contact: Created By [Jukka Niiranen](#).
On [Jon Rivers](#)'s wall
Today

 **Andrew Bibby**
Contact: Created By [Jukka Niiranen](#).
On [Andrew Bibby](#)'s wall
Yesterday

 **Mark Smith via Twitter on 9.11.2015 22:18**
New signal from [Mark Smith](#) on Twitter: "New version of Network Visualisations for Dynamics CRM" #MSdynCRM <https://t.co/HanllcfTSF>
On [Mark Smith](#) via Twitter on 9.11.2015 22:18 's wall
Yesterday

 **leontribe**
[Jukka Niiranen](#) created [leontribe](#)
On [leontribe](#)'s wall
5.11.2015 1:01



Adding Social menu items to CRM Sitemap

- Make social data more prominent to CRM users by adding them into the main Nav Bar
- Use a tool like XrmToolBox to create a new sitemap area, add links to social entities, set default dashboard

Microsoft Dynamics CRM Social | Social Activities | ≡ 🕒 ➕ 🔍 🖨️ Jukka Niiranen Contoso ⚙️ ?

Sales Service Marketing Social Settings Help Center

My Work Customers Social Data Social Engagement

Dashboard	Accounts	Social Profiles	Open MSE
What's New	Contacts	Social Activities	
Activities		Signals	

Timeline (Recent Posts):

Date	Message	Source	User	Score	Profile
4.11.2015 19:28	I've just seen the #Salesforce Lightning Experience. Talk about imitation being the sincerest form of flattery.	Twitter	leontribe	0,00	
4.11.2015 9:05	#MSDYNCRM Online tooling for building form URLs https://t.co/p7sODMmcy #GIF	Twitter	sirjameswood	0,00	
3.11.2015 21:10	Dynamics CRM and FieldOne comes together as fork and knife for your business #MSDYNCRM	Twitter	nzCRMguy	0,00	
3.11.2015 20:30	If you haven't checked out latest @PFEDynamics Blog- take a look at the new #PowerShell	Twitter	carsten_mscrm	1,00	
3.11.2015 17:00	@MSFTDynamics Lots of our @CRMUG members are excited to find out what's coming...	Twitter	AdamVero	1,00	



Searching for social data

Microsoft Dynamics CRM | ≡ Settings | Administration

NEW ACTIVITY NEW RECORD IMPORT DATA

Search

SEARCH

FILTER WITH None

Accounts	Contacts	Leads	Activities	Signals
 CRMUG ---- https://www.crmug.co...	 Jerry Weinstock Dynamics CRM MVPs crminnovation	 #MSDYNCrM Online vs. On-Premise vs. Partner Gus Gonzalez ----	 #MSDYNCrM Online vs. On-Premise vs. Partner Gus Gonzalez Social Activity	 David Pennington via Twitter on 19.10.2015 CRMUG news Twitter
 Dynamic Communities, Inc. United States http://www.dynamico...	 Tony Stein CRMUG tonysteinND	 48 hours until the @CRMUGUK meeting in Andrew Bibby ----	 @Amway giving the #GrandRapids #CRMUG ---- Social Activity	 Neil Benson via Twitter on 16.11.2015 20:28 CRMUG keeps on gro... Twitter
			 @MSFTDynamics Lots of our @CRMUG members Adam Vero via Twitter ... Social Activity	
			 48 hours until the @CRMUGUK meeting in Andrew Bibby Social Activity	
			 5 Top Customer Service Takeaways from CRMUG David Pennington via T... Social Activity	
			 Headed to the @crmug meeting tonight. Look Neil Benson via Twitter...	

- Contents of Social Posts & Profiles can be searched via standard Multi-entity Quick Find
- Tip: new Relevance Search in CRM 2016 will make the social data search much smarter!
 - *#itwillbeawesome*



Copy Twitter handles to Contact records

- Social Profiles associated to a contact will be visible in related records, via 1:N relationship
- Sometimes it might be nice to see them directly as links on the contact form, though
- You can create a workflow process for Social Profile entity to easily achieve this

Microsoft Dynamics CRM | ≡ Social | ▾ Contacts | ▾ Jukka Niiranen | ▾

+ NEW DEACTIVATE CONNECT | ▾ ADD TO MARKETING LIST ASSIGN EMAIL A LINK ▾



CONTACT ▾

Jukka Niiranen ▾

[Summary](#)

CONTACT INFORMATION	
Full Name *	Jukka Niiranen
Job Title	--
Account Name	 Dynamics CRM MVPs
Email	--
Business Phone	--
Mobile Phone	--

[POSTS](#) [ACTIVITIES](#) [NOTES](#)

All | Add Phone Call Add Task ...

 Prepare MSE presentation slides
Due Date 13.11.2015 8:00
Modified by Jukka Niiranen Just now
 Jason Gumpert; Jukka Niiranen ; Discussed the agenda for MSW webcast
Completed by Jukka Niiranen Just now
 Your Interaction Network in Microsoft
Posted by jukkan 25.10.2015 20:58
Sentiment Value 0 Posted As Public Message



Workflow process on Social Profile create

Hide Process Properties

Process Name * Copy Twitter Handle and URL to contact

Activate As Process

Available to Run

Run this workflow in the background (recommended)

As an on-demand process

As a child process

Workflow Job Retention

Automatically delete completed workflow jobs (to save disk space)

Entity Social Profile

Category Workflow

Options for Automatic Processes

Scope Organization

Start when: Record is created

Record status changes

Record is assigned

Record fields change

Record is deleted

Trigger the process on create of new Social Profile

Check that Social Channel is Twitter

If Customer (Contact):Full Name contains data AND Social Profile:Social Channel equals [Twitter], then:

Update Twitter details to contact
Update: Customer (Contact) [View properties](#)

Contact: Information - Microsoft Dynamics CRM - Mozilla Firefox
https://di201510us.crm.dynamics.com/SFA/Workflow/entityform

File Close

Process: Copy Twitter Handle and URL to contact

Update Contact

Mobile Phone

Twitter

Handle

[Profile Name(Social Profile)]

URL

[Profile Link(Social Profile)]

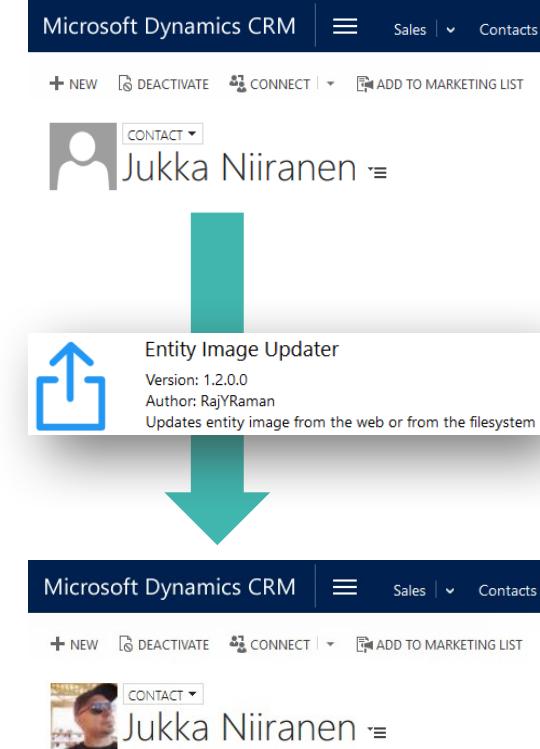
Check that the Social Profile is for the right channel

Update your custom fields on the contact

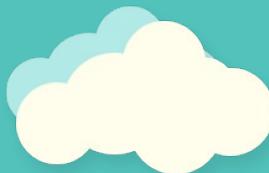


Updating entity images

- MSE doesn't sync the social profile's user image to CRM contacts
- By storing Twitter handles on CRM contacts, we can use this data to query profile image APIs
- Entity Image Updater by [Natraj Yegnaraman](#) (for XrmToolBox) allows you to run bulk updates to selected set of contacts and match their profile images with services like Twitter, Gravatar, Clearbit, or even local folders



Get it from:
<http://bit.ly/crmimg>



Updating entity images (2)

The screenshot shows the XrmToolBox Entity Image Updater interface. A blue callout '1. Select field to use for profile image matching' points to the 'Attribute to match' section where 'Twitter Handle' is selected. A second blue callout '2. Limit the target contacts with FetchXML query criteria, if needed' points to the 'Results' grid, which displays 16 contact records with their profile images. A third blue callout '3. Matched images are updated to CRM records' points to a 'Success' dialog box in the foreground stating '16 images updated'.

1. Select field to use for profile image matching

2. Limit the target contacts with FetchXML query criteria, if needed

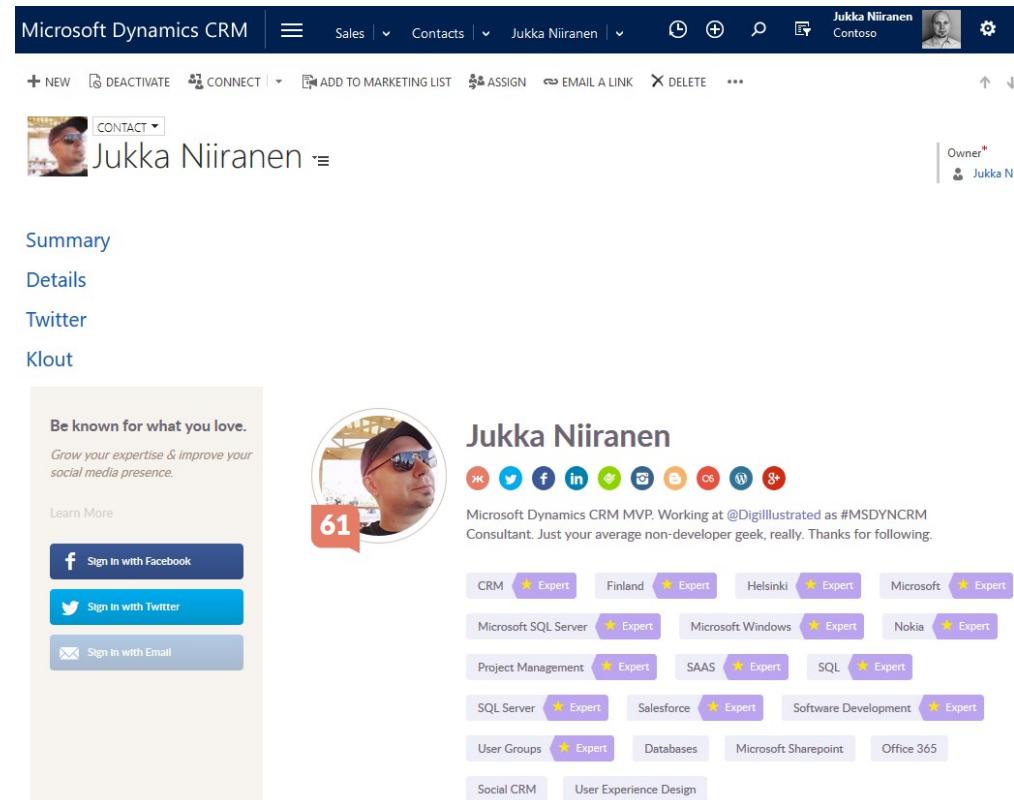
3. Matched images are updated to CRM records



Embedding external profiles to CRM forms

- Having social profile names stored on contact also enables using them in form scripts, to dynamically retrieve data from external websites or widgets
- Example: add an iFrame to contact form, use OnLoad script to open [https://klout.com/\[profile\]](https://klout.com/[profile]) to view the customer's social influence score & areas of expertise

```
function setKloutIFrameURL() {
    var IFrame = Xrm.Page.ui.controls.get("IFRAME_Klout");
    var twitterHandle =
        Xrm.Page.data.entity.attributes.get("new_twitterhandle").getValue();
    var newTarget= "https://klout.com/"+twitterHandle;
    IFrame.setSrc(newTarget);
}
```



Thanks for your time!

For more Social Engagement and
Dynamics CRM related content,
visit <http://survivingcrm.com/>



Keep on #MSDynCRM:ing!

#MSDYNCRM  

Overview Conversations Sentiment Location Sources

SENTIMENT

8.2 index 8.2 change 

-10 0 +10

LOCATION INSIGHTS



ASIA
EUROPE
AFRICA
SOUTH AMERICA
NORTH AMERICA

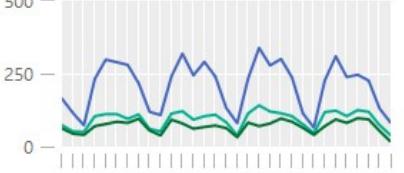
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PHRASES

fields: customer service release ms dynamics crm
@msftdynamics microsoft dynamics check via crm #msdynCRM
ms top online #CRM tip CRM using #job data
integration microsoft dynamics CRM #msdynCRM #msdynamics service
nzcrmguy dynamics CRM dynamics knowledge
marketing new #job #msdynCRM #msdynamics experience
#msdynCRM online #CRM #msdynCRM #msdynCRM #CRM
#msdynCRM #CRM2016

PHRASES HISTORY

#msdynCRM CRM dynamics



500
250
0
16 24 01 15

TRENDING PHRASES

get #msdynCRM #msdynamics
using microsoft dynamics CRM tip
via move access team
new #job update
service #msdynCRM #CRM

TWITTER HASHTAGS

Hashtag	Count
#msdynCRM	6,510
#CRM	713
#msdynamics	287
#job	253
#CRM2016	185

SOURCES

Twitter 6,510 

PHRASES ON TWITTER

using dynamics microsoft dynamics
#msdynamics CRM tip
new #job #msdynCRM #CRM
#msdynCRM dynamics CRM #job
#msdynCRM #msdynamics

LANGUAGES

English 6,510 