

ClickDimensions Quick Start Guide

For Microsoft Dynamics CRM 2011

9/1/2011

ClickDimensions



Online Training Resources

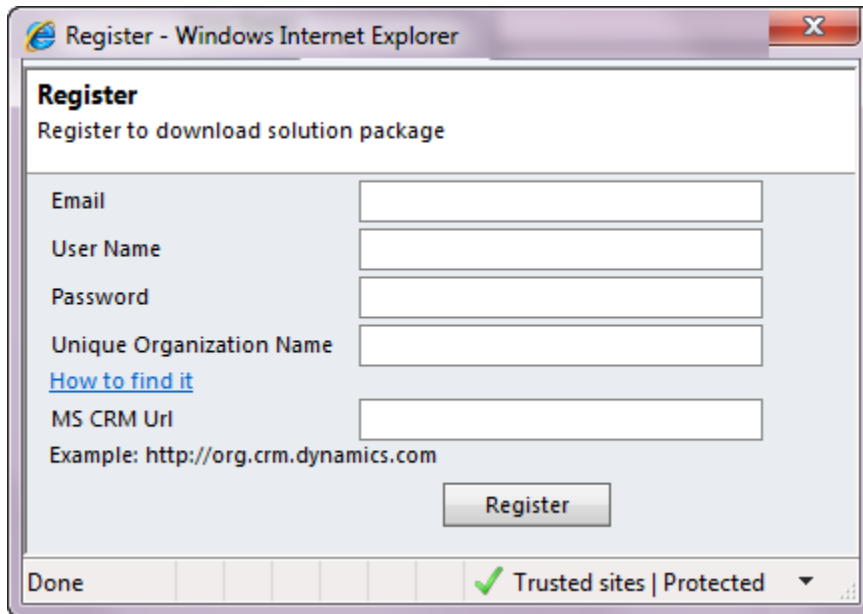
This guide will explain how to register for and use a ClickDimensions Marketing Automation deployment. For deeper training resources you may also visit our online training center at <http://help.clickdimensions.com>

Registering and Deploying the Solution

To deploy ClickDimensions Marketing Automation for Microsoft Dynamics CRM you first need to register for a solution package. Click the graphic below or go to <http://www.clickdimensions.com/2011> to register.

www.clickdimensions.com/2011

After completing an informational form, the ClickDimensions 2011 registration page will appear



The screenshot shows a web browser window titled "Register - Windows Internet Explorer". The page content includes the heading "Register" and the sub-heading "Register to download solution package". Below this, there are five input fields: "Email", "User Name", "Password", "Unique Organization Name", and "MS CRM Url". An example URL "http://org.crm.dynamics.com" is provided below the MS CRM Url field. A "Register" button is located at the bottom of the form. The browser's status bar at the bottom shows "Done" and "Trusted sites | Protected".

Enter the values for your CRM 2011 deployment. The user entered here will be the user that the ClickDimensions service uses to connect to your CRM. Usually you will want to create a new user for this purpose. To understand which security privileges to provide this user consult our security requirements guide at <http://help.clickdimensions.com/clickdimensions-security-requirements/>

Note: Make sure and set the time zone of the ClickDimensions user account to GMT/UTC (Greenwich Meantime/Universal Time)

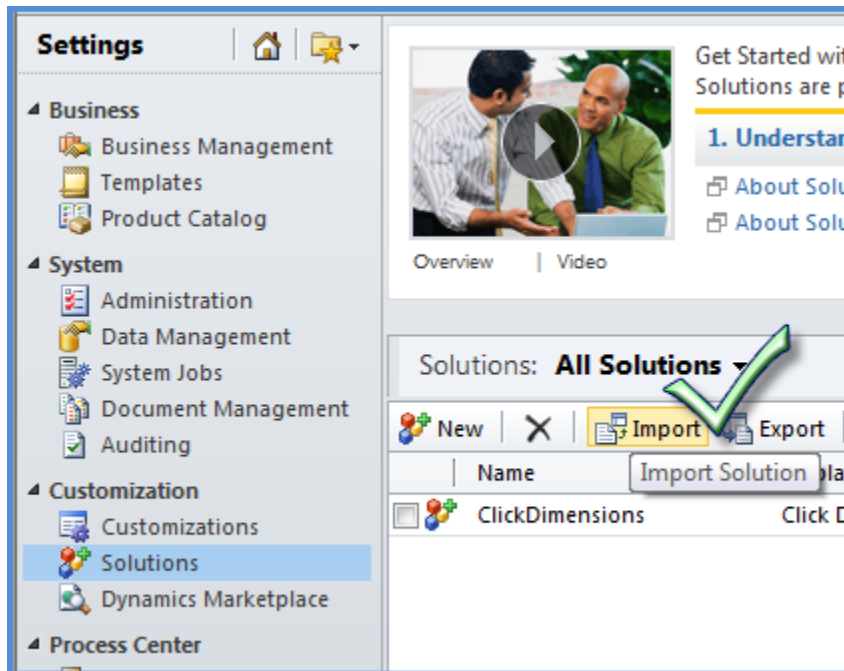
Within one business day of your registration (usually much sooner), you will receive an email which will contain a link to download the custom solution package. Download the file and save it as "zip" file. You

can then import the zip file into Microsoft CRM. To Import the package go to Settings > Customization > Solutions and click the Import button.

For detailed instructions on the solution import process read this blog post.

<http://blog.clickdimensions.com/2011/02/deploying-clickdimensions-for-microsoft-crm-2011.html>

Important: When importing, please check to activate processes in order to enable ClickDimensions workflows and plugins.



Initial Solution Setup

Now that the solution is deployed, there are a couple of initial setup items you will need to do. These are:

- Locate the tracking script and place on your web pages
- Add a domain record
- Create an email CNAME record (optional)

ClickDimensions Security Roles

Once ClickDimensions is installed, you will want to make sure everyone has the correct Security Roles. Below is a list of all Security Roles ClickDimensions creates and their functions.

ClickDimensions Core

This role should be assigned to all users (even if not using ClickDimensions). It contains the minimum set of privileges that are required by the ClickDimensions plugins and will prevent failures in creating leads/contacts and opportunities

ClickDimensions User

This security role should be assigned to users (none administrators) who view data generated by ClickDimensions. Most of the privileges are set to the Read level so the users can view the tracking data. This role also allows the user the ability to send emails.

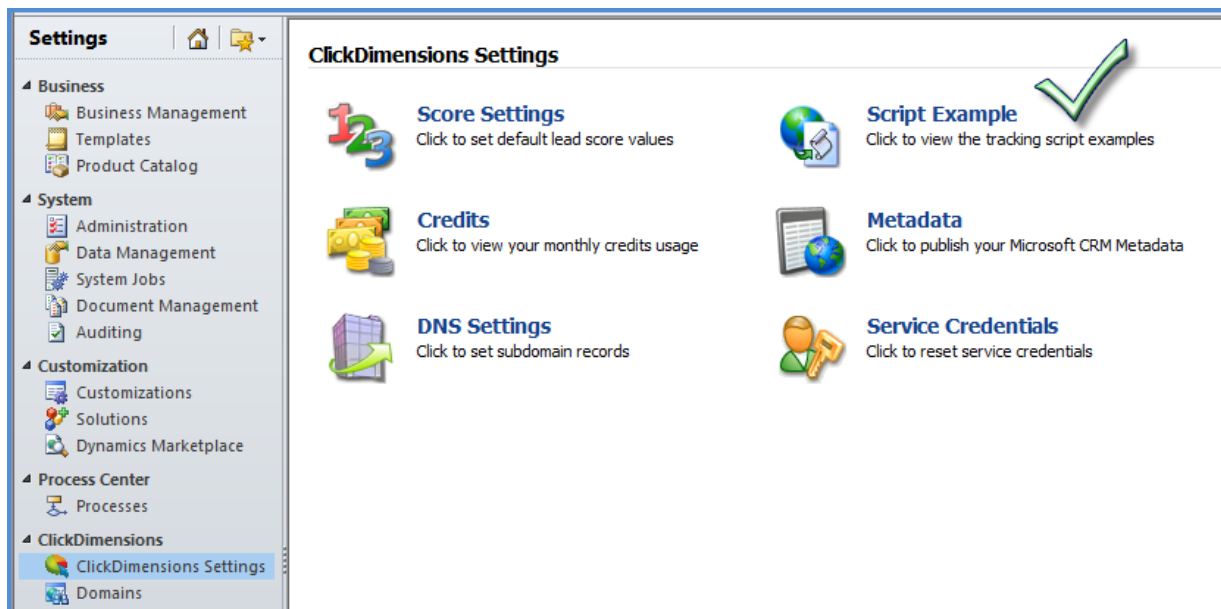
ClickDimensions Service

This role should be assigned to the ClickDimensions service user in case the System Administrator role cannot be assigned. For more information on the required privileges for this particular user please go to the Security Requirements Guide.

Locate the tracking script and place on your web pages

In order for the traffic from your web site to be tracked inside your CRM you will need to place a block of JavaScript code on each of your web pages. This is usually accomplished by placing the javascript into your global footer file or any other mechanism that causes it to be placed on each page. It is best to place the JavaScript toward the bottom of the page and always before the end body tag `</body>` for the page.

Locate your script by going to `Settings > ClickDimensions > ClickDimensions Settings > Script Example`



When you click on 'Script Example' you will see your unique script. Be sure are read the instructions on the page to understand how to place the script.

Tracking Script

Tracking Script Examples

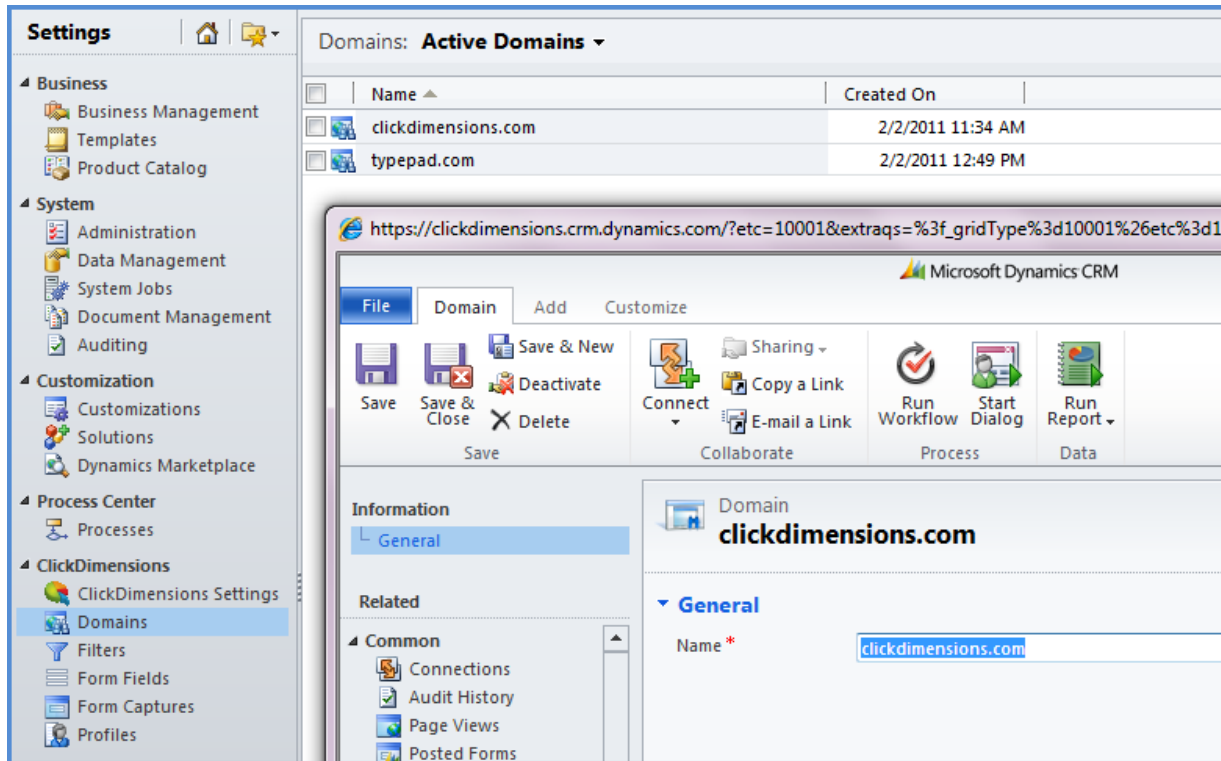
The following example contains the base tracking script that should be placed in all web pages you would like to be tracked by the ClickDimensions service. It is recommended to place the script at the bottom of your web pages before the closing BODY tag. If you use a global footer you may place the script within the global footer as long as the footer is inserted before the closing BODY tag of your pages. Please note that this script already contains your customer-specific Account Key so it is ready to use. Don't forget to also create the domain record for any sites you choose to track with ClickDimensions. To configure the domain records add one or more Domain entity record. These can be found under Settings > ClickDimensions > Domains.

```
<script type="text/javascript">
  var cdJsHost = (("https:" == document.location.protocol) ? "https://" : "http://");
  document.write(unescape("%3Cscript src=" + cdJsHost + "analytics.clickdimensions.com/ts.js"
  type="text/javascript"%3E%3C/script%3E"));
</script>

<script type="text/javascript">
  var cdAnalytics = new clickdimensions.Analytics('analytics.clickdimensions.com');
  cdAnalytics.setAccountKey('aK7L504BWUEqa87oHBwPlw');
  cdAnalytics.setDomain('clickdimensions.com');
  cdAnalytics.trackPage();
</script>
```

Add a domain record

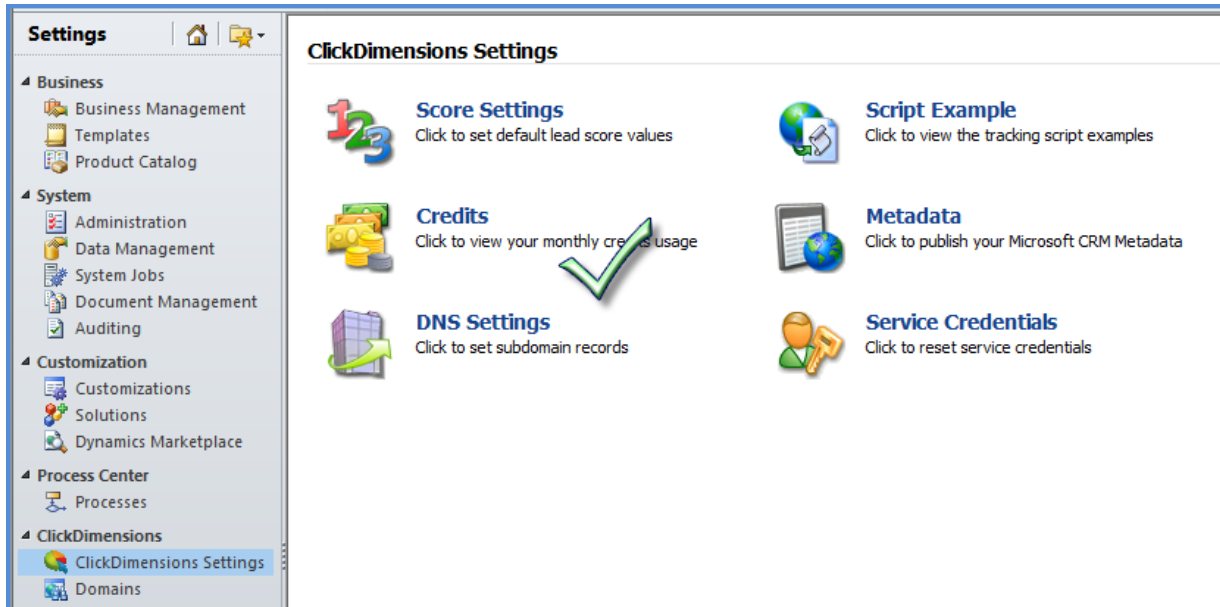
The next step is to add a Domain record to tell our solution that it is OK to accept tracking from your domain. You do this by going to Settings > ClickDimensions > Domains and clicking the new button to add a new Domain record



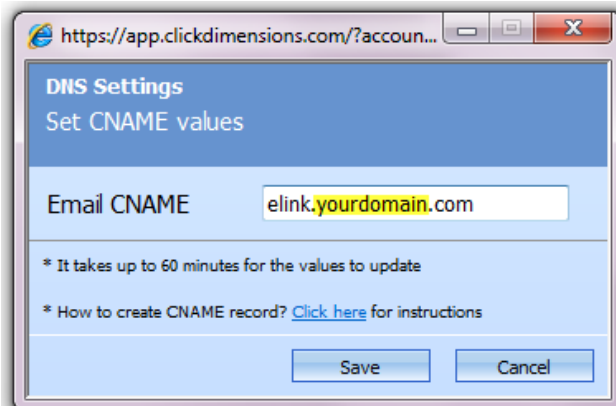
Create an email CNAME record

If you want the links in your emails to have your domain in them (instead of the default 'link.clickdimensions.com') go to

Settings > ClickDimensions > ClickDimensions Settings > DNS Settings and you will see a place to change this. Note that you MUST make a CNAME entry in your DNS prior to doing this. Your web administrator will know how to do this and can reference our CNAME guide at <http://help.clickdimensions.com/clickdimensions-security-requirements/>

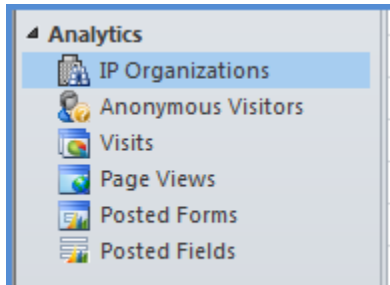


Only update the CNAME entry below once the change has been made to your DNS



Take a look at the web tracking results

Now that your tracking script is in place on your site go to the Analytics area under marketing and take a look at the various tracking entities.



A detailed explanation of each entity and its contents is located at <http://blog.clickdimensions.com/2011/01/clickdimensions-entities-definitions-and-screen-shots.html>

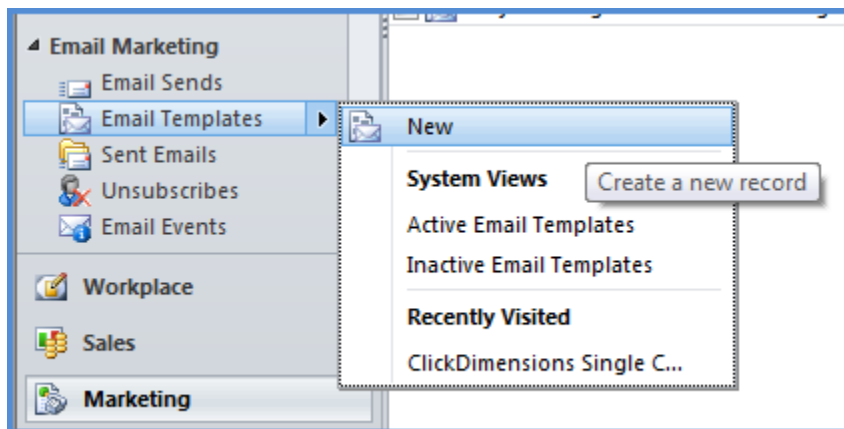
Also, be sure and check out these related blog posts:

[Correlating all traffic from a single IP address](#)

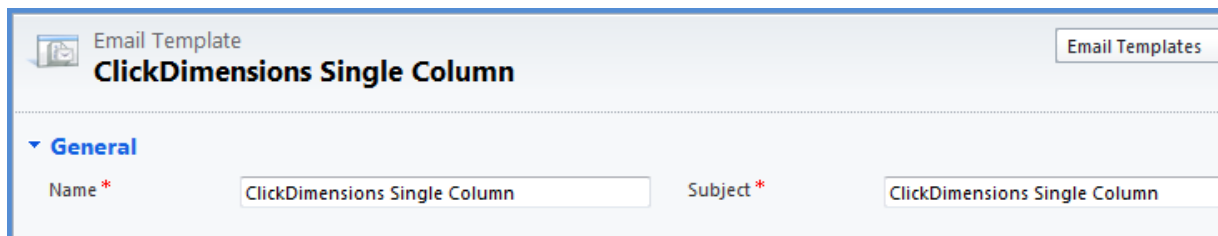
[Manually identifying web traffic](#)

Sending your first email

Now let's send an email. We'll start by creating an Email Template record. Go to the Email Templates area and click 'new' to create a new email template record.



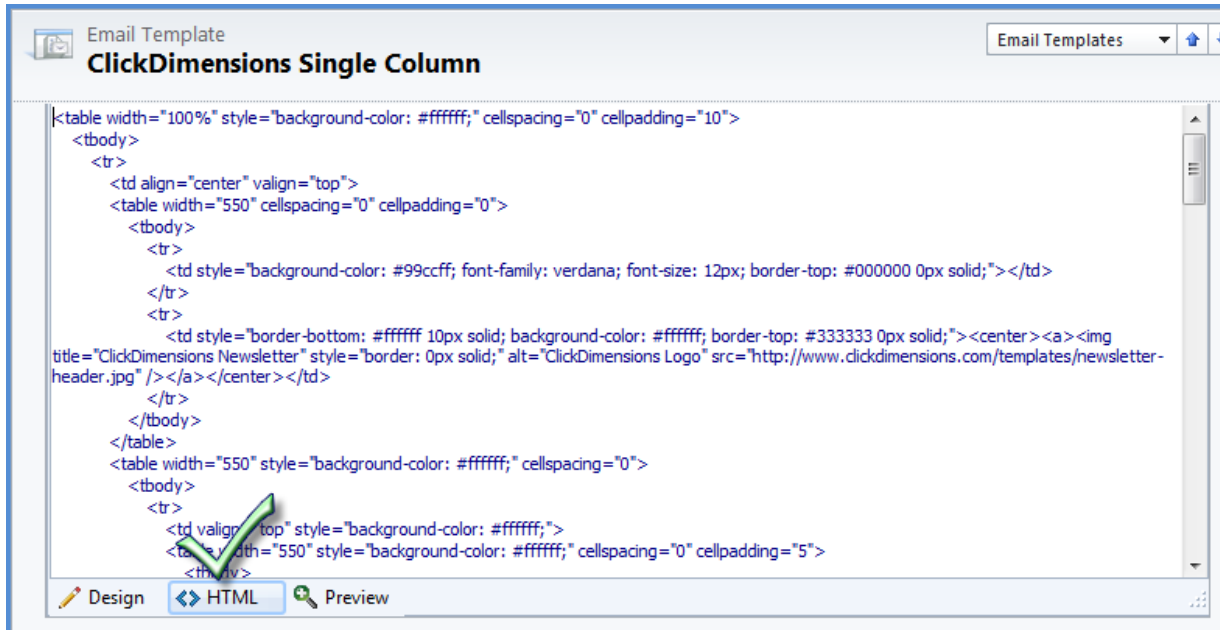
Name your template, give it a subject and save the record. Upon saving the HTML editor will appear if you have already logged into ClickDimensions. If you have not already logged in you will see a login screen and should supply your email address and CRM password. Login is addressed earlier in this document.



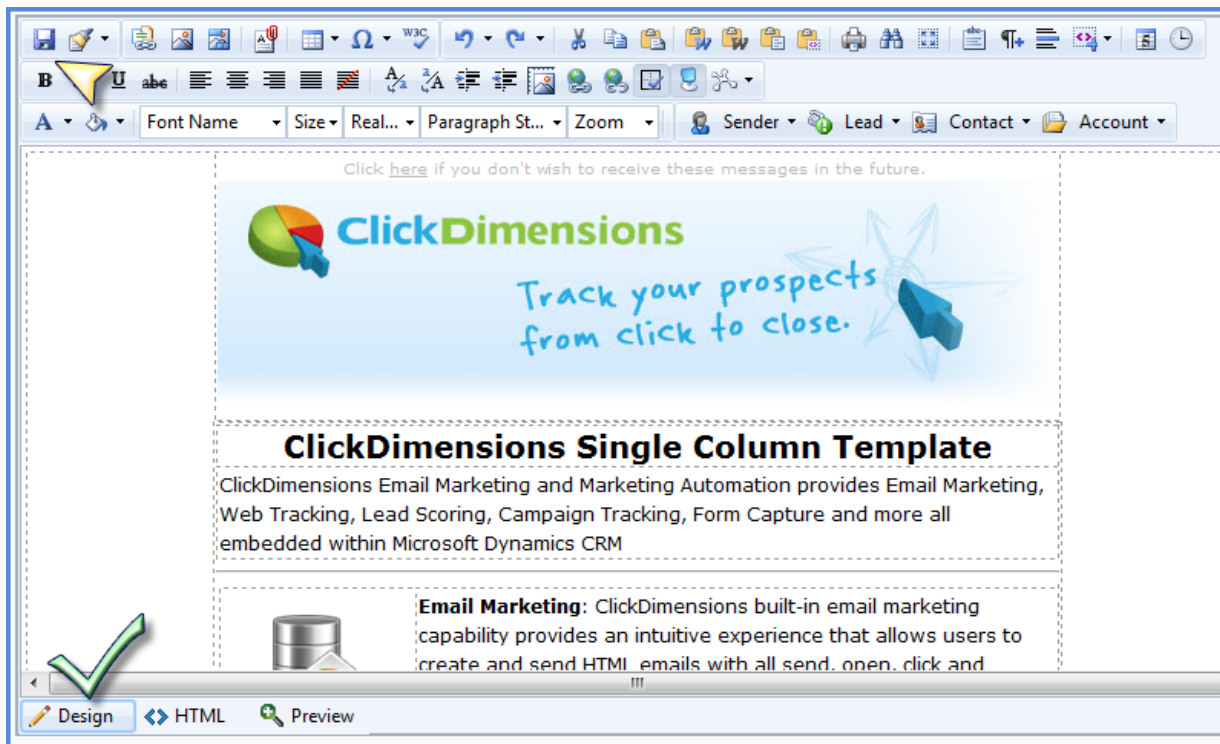
Go to <http://www.clickdimensions.com/2011/emailtemplate.txt>, select all the text and copy it. This is HTML that will be your first email template.

Note: there are more ready-made HTML templates available on our site in the [zip file here](#)

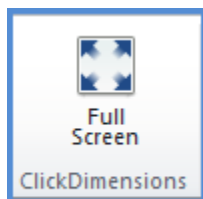
On the HTML editor in the Email Template record click the HTML tab and paste the text/HTML you just copied.



Now click back on the editor's design tab and click the save button in the editor to save the contents of the editor.



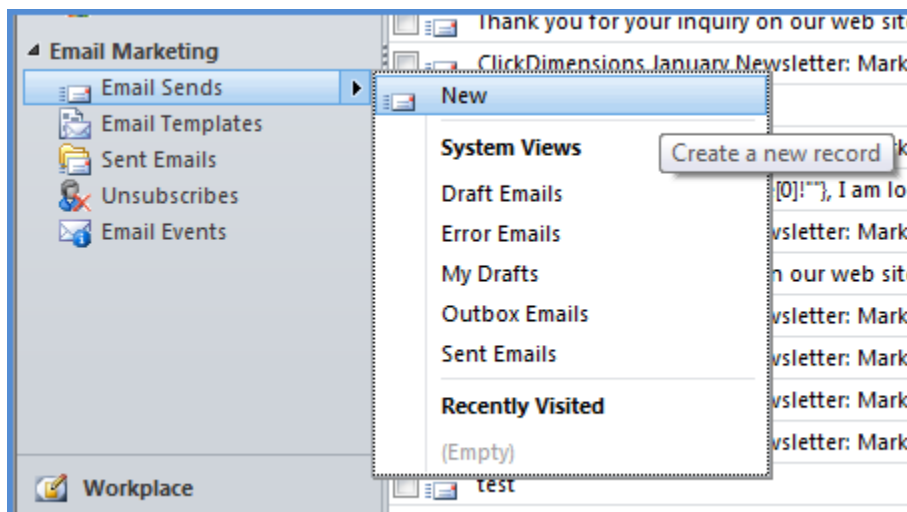
Important: With our email editor we always recommend using the **full screen button** when editing templates. Full screen mode gives you more room to work and also makes it less likely that you will forget to save the template after editing. **Note that you must save the content in the HTML editor separately from the save button on the record.**



Remember, **always save your template changes using the save button in the HTML editor**



Now, let's send the template. Start by creating a new Email Send record.



On the Email Send record be sure and include the highlighted components below:

- **Template:** choose any email template
- **From:** the email can come from the individual record owners, a specific user or a generic email address. If you want the email to come from the individual record owners then also specify a generic email address in case one of your CRM users does not have a valid email address on his or her CRM user record
- **Campaign (optional):** choose any CRM campaign (the individual sent emails will link back to the campaign)
- **Recipients:** you can send to any mix of Leads, Contacts, Accounts and Marketing Lists

General

Subject * ClickDimensions Single Column

Campaign CRM 2011 Launch Test Email + johngravely@hotmail.com

Email Template ClickDimensions Single Column Owner * John Gravely

Track Email Events No Yes Status Reason Draft

From

From Record Owner (If has email) * No Yes From User

From Name * ClickDimensions Marketing From Email * marketing@clickdimensions.com

Delivery

Send Immediately * No Yes Send On

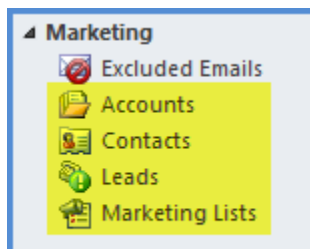
Recipients

Search for records

Name	Type	Marketing List ...	Last Used On	Purpos
Test List	Static	Lead		

Status Active

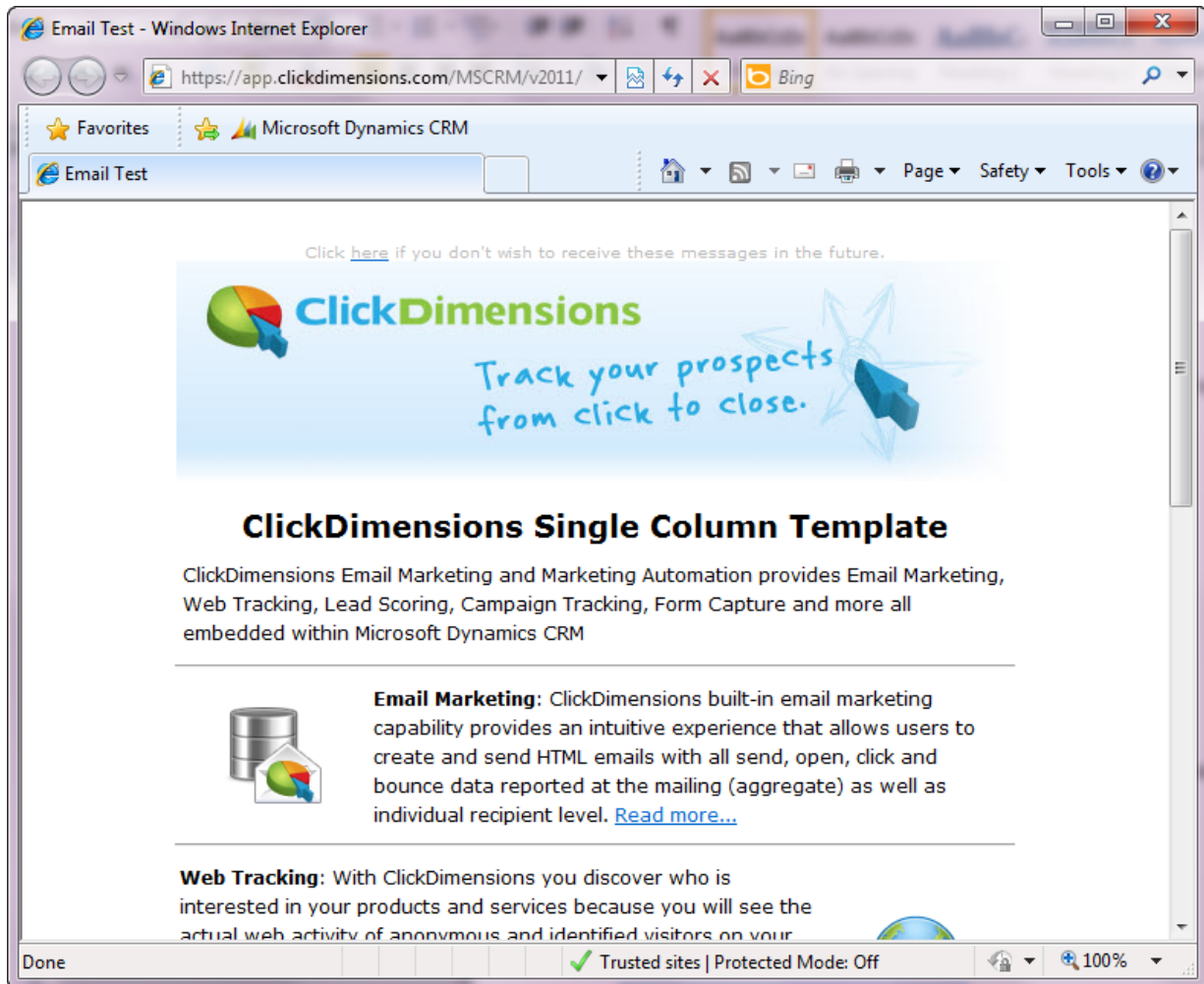
Add recipients by using the menu items on the left navigation of the Email Send record



You may add an email address into the test email field and click test to see what your email will look like



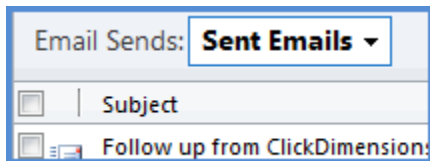
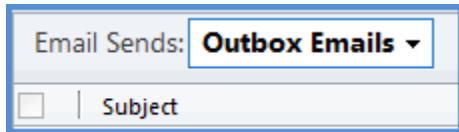
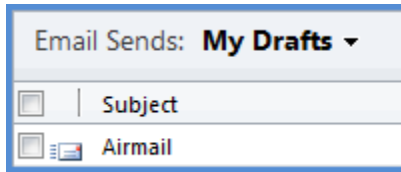
The test email will also appear in a web browser. **Note** that personalization fields will not populate for test emails and links will not be trackable.



Now you can click send to actually send the email



The email will go from being in the 'My Drafts' filter to the Outbox (briefly) to the 'Sent Emails' filter



As soon as you send the email you will start to see tracking come back into CRM. All tracking events (i.e. Email Event records) including opens, clicks and bounces are fed back into CRM in real time.

Go to the Sent Emails area to see a list of the individual emails that were sent

A screenshot of a table titled 'Sent Emails: Active Sent Emails'. The table has columns for Subject, Email Send, To Email, Score, Deliveries, Opens, and Clicks. It contains 14 rows of data, all with the same subject: 'Follow up from ClickDimensions demo today'. The 'To Email' column lists various email addresses, and the 'Opens' and 'Clicks' columns show tracking data for each email.

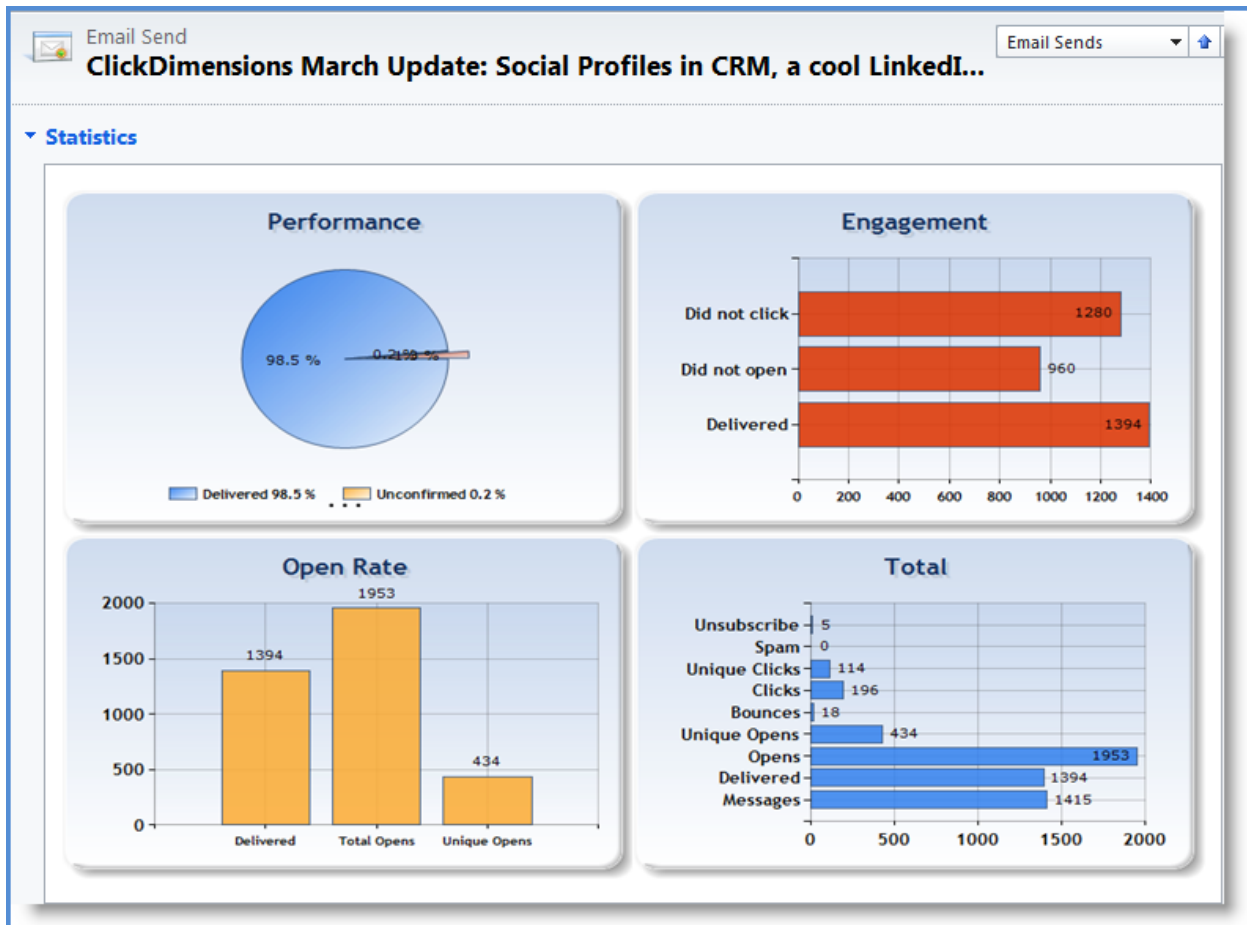
Subject	Email Send	To Email	Score	Deliveries	Opens	Clicks
Follow up from ClickDimensions demo today	Follow up from ClickDimensions dem	patrick.anderson@micros...			1	0
Follow up from ClickDimensions demo today	Follow up from ClickDimensions dem	brian.bakke@microsoft.c...			1	0
Follow up from ClickDimensions demo today	Follow up from ClickDimensions dem	pablo.villa@microsoft.com			1	0
Follow up from ClickDimensions demo today	Follow up from ClickDimensions dem	David.Block@microsoft.c...			1	0
Follow up from ClickDimensions demo today	Follow up from ClickDimensions dem	Tim.May@microsoft.com			1	0
Follow up from ClickDimensions demo today	Follow up from ClickDimensions dem	Kathy.Dean@microsoft.com			1	0
Follow up from ClickDimensions demo today	Follow up from ClickDimensions dem	Mark.Beckmann@micros...			1	0
Follow up from ClickDimensions demo today	Follow up from ClickDimensions dem	holycha@microsoft.com			1	0
Follow up from ClickDimensions demo today	Follow up from ClickDimensions dem	chris.kahl@microsoft.com			1	0
Follow up from ClickDimensions demo today	Follow up from ClickDimensions dem	john.gravelly@clickdimen...			1	5
Follow up from ClickDimensions demo today	Follow up from ClickDimensions dem	pauls@microsoft.com			1	0
Follow up from ClickDimensions demo today	Follow up from ClickDimensions dem	chet.kloss@microsoft.com			1	0
Follow up from ClickDimensions demo today	Follow up from ClickDimensions dem	trevor.mitchell@microsoft...			1	0
Follow up from ClickDimensions demo today	Follow up from ClickDimensions dem	rchoi@microsoft.com			1	4

And the Email Events Area shows all the events in real time

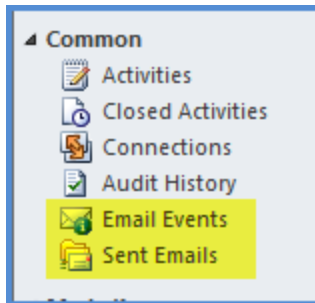
Email Events: **Active Email Events** ▾

<input type="checkbox"/>	Time	Type	Account	Contact	Lead
<input type="checkbox"/>	02-04-2011 18:18:17 (UTC)	Open		Tony Clayton	
<input type="checkbox"/>	02-04-2011 18:18:17 (UTC)	Open		Tony Clayton	
<input type="checkbox"/>	02-04-2011 18:06:39 (UTC)	Open		John Gravely	
<input type="checkbox"/>	02-04-2011 18:07:35 (UTC)	Open		Rich Choi	
<input type="checkbox"/>	02-04-2011 18:04:11 (UTC)	Deliver		Melanie Roseland	
<input type="checkbox"/>	02-04-2011 18:04:11 (UTC)	Deliver		Trevor Mitchell	
<input type="checkbox"/>	02-04-2011 18:07:18 (UTC)	Open		John Gravely	
<input type="checkbox"/>	02-04-2011 18:04:11 (UTC)	Deliver		Gareth Sullivan	
<input type="checkbox"/>	02-04-2011 18:04:11 (UTC)	Deliver		Chris Kahl	
<input type="checkbox"/>	02-04-2011 18:07:35 (UTC)	Open		Rich Choi	
<input type="checkbox"/>	02-04-2011 18:04:10 (UTC)	Deliver		Jim Brown	
<input type="checkbox"/>	02-04-2011 18:04:11 (UTC)	Deliver		Tim May	
<input type="checkbox"/>	02-04-2011 18:04:11 (UTC)	Deliver		Gareth Sullivan	

When you open the Email Send record you will see statistics associated with the send



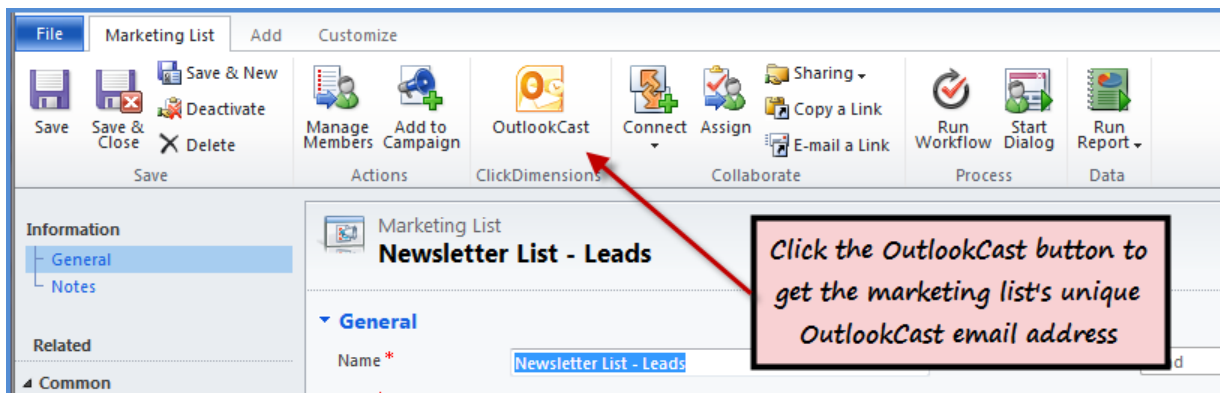
You will also see all Sent Emails and Email Events for the send



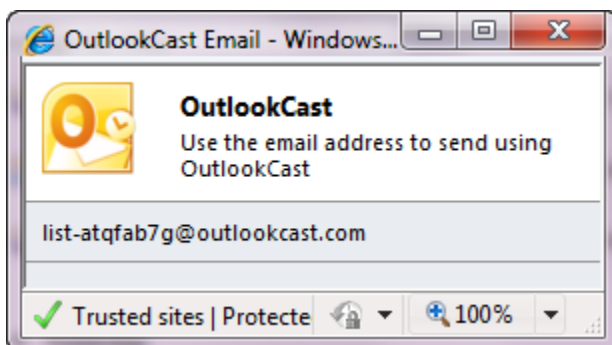
Sending an email using ClickDimensions OutlookCast

ClickDimension's OutlookCast feature lets you prepare emails using Microsoft Outlook and send them through the ClickDimensions delivery service. Just like any ClickDimensions email your email will be full trackable with all results coming back into CRM. You may [click here to watch a video](#) explaining how to send an OutlookCast email or click [here to see a more detailed step by step explanation](#).

To send an OutlookCast email choose the marketing list you want to send to and click its OutlookCast button



Copy the unique email address for the list and send your email to that address



You will receive a confirmation email that will link you to a pre-configured ClickDimensions Email Send record. Inspect the record and click send when you are ready for the email to be sent.

Getting More Advanced with Email

Below are some blog post links with more advanced email topics

[Personalizing emails](#) (blog post)

[Personalizing emails](#) (instructional video)

[Sending email using Microsoft CRM workflow](#)

Configuring a web site form to integrate with CRM

With ClickDimensions it is easy to configure existing forms on your web site to integrate to Microsoft CRM. If you would like to do this please refer to our forms integration guide at

<http://help.clickdimensions.com/integrating-forms-using-form-capture/>

Additional Training Resources

Additional training videos and materials are available online at <http://help.clickdimensions.com>