

SalesIntel Dynamics 365 Integration Guide

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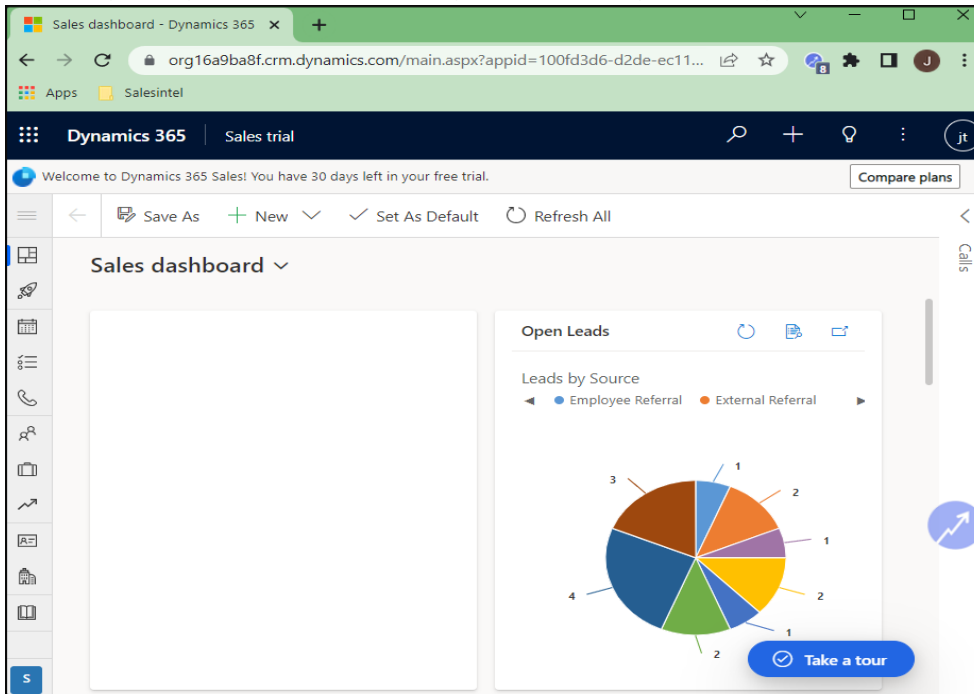
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Dynamics 365 Domain

Before setting up your Dynamics 365 Settings inside SalesIntel, you are required to submit your Dynamics 365 Domain to support@salesintel.io

To get your Dynamics 365 domain, follow the steps below:

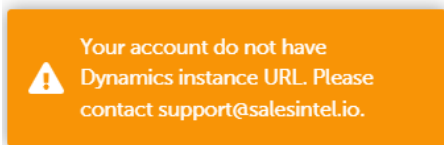
1. Login to your Dynamics 365 instance. (The below sample is for Dynamics 365 Sales)



2. Copy the domain inside the Address bar

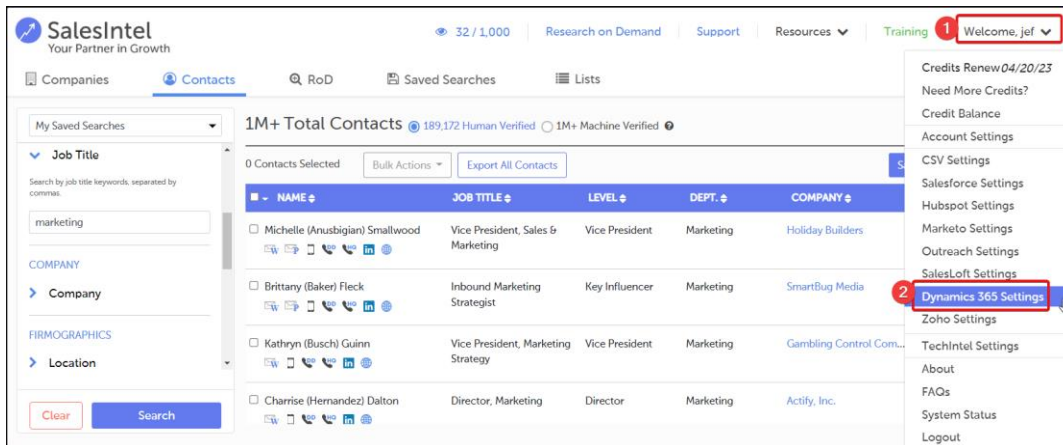


Note: If you set up your Dynamics 365 Settings or tried to export to your Dynamics 365 CRM without sending your domain to support, you'll receive the below warning.

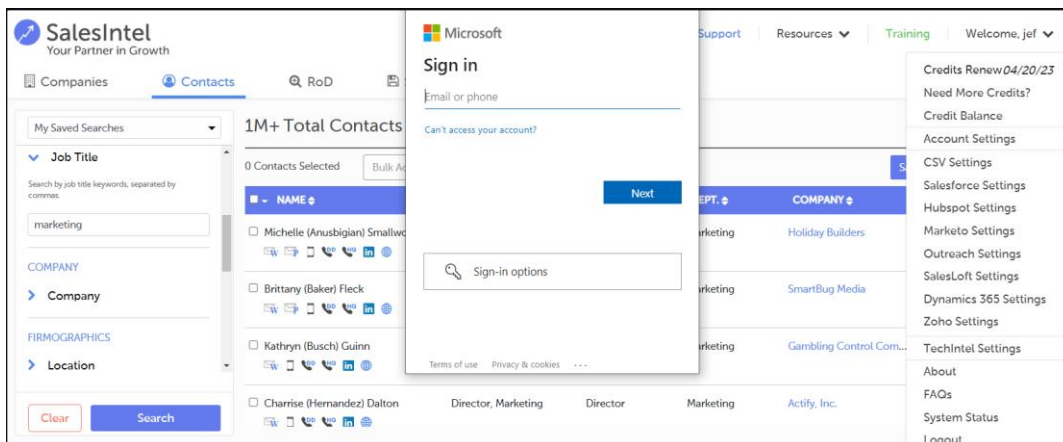


SalesIntel Dynamics 365 Settings

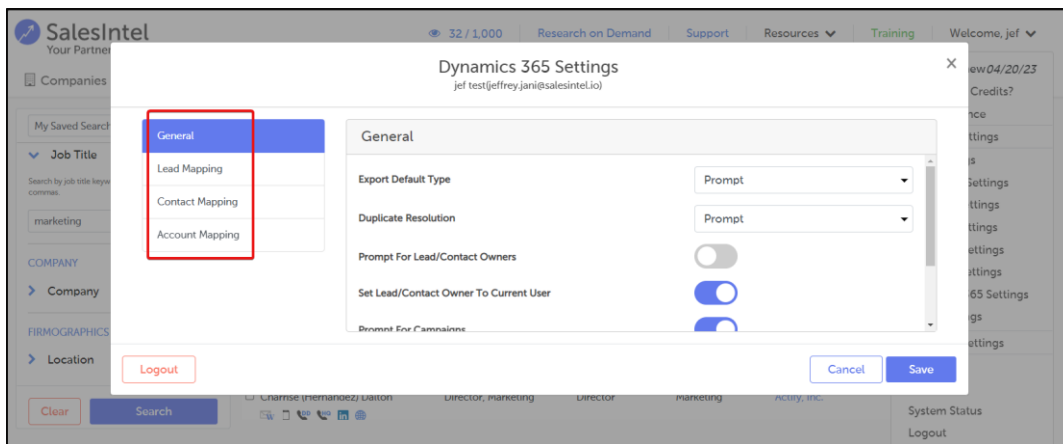
You can change your Dynamics 365 settings manually by clicking the Dynamics 365 settings option from the drop-down menu on the top right.



You'll be asked to log in to your Microsoft Dynamics365 account (if not already logged in).

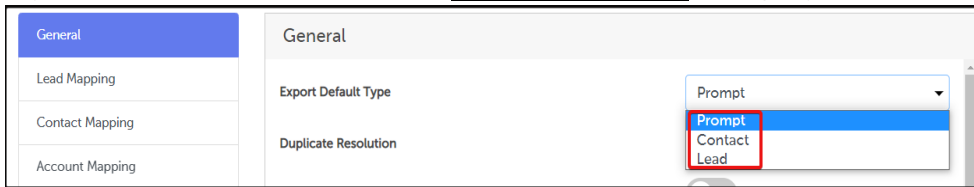


On the next screen, you'll be able to manage General settings and field mappings.

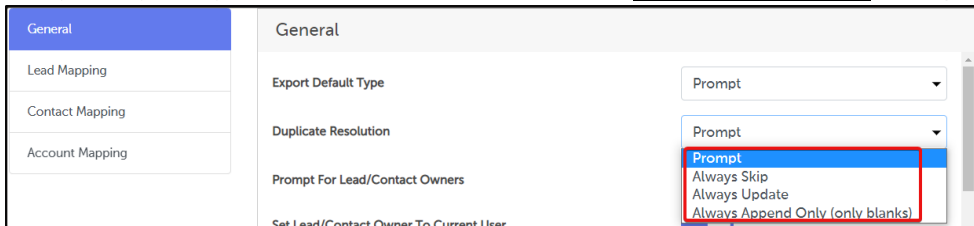


General Settings

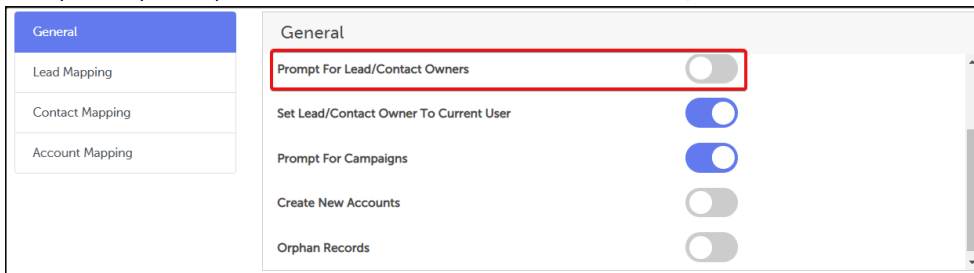
- a) **Export Default Type** – you can select to have a default of either a Lead or contact every time you export a record from SalesIntel. Or to prompt for selection during export.



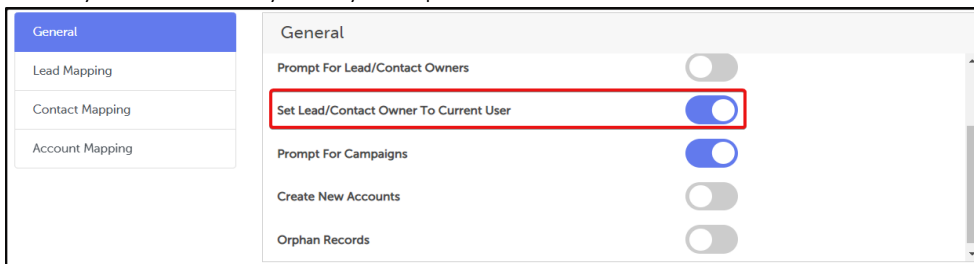
- b) **Duplicate Resolution** – you can select to have a default of either Skip, Update, or only blank fields every time you export a record from SalesIntel. Or to prompt for selection during export.



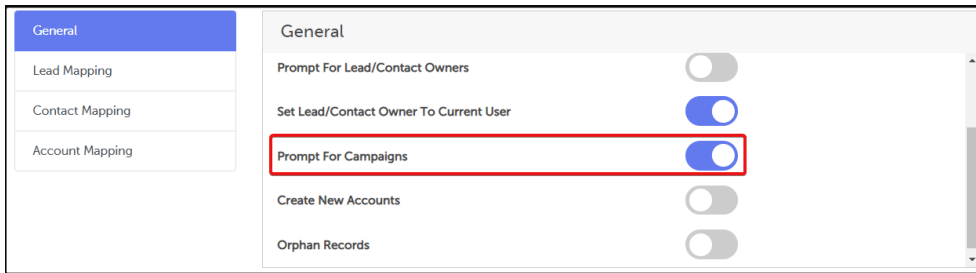
- c) **Prompt for Lead/Contact Owners** – you can enable the option to prompt a selection of owner every time you export a record from SalesIntel. If disabled, the record will be set to “unassigned”.



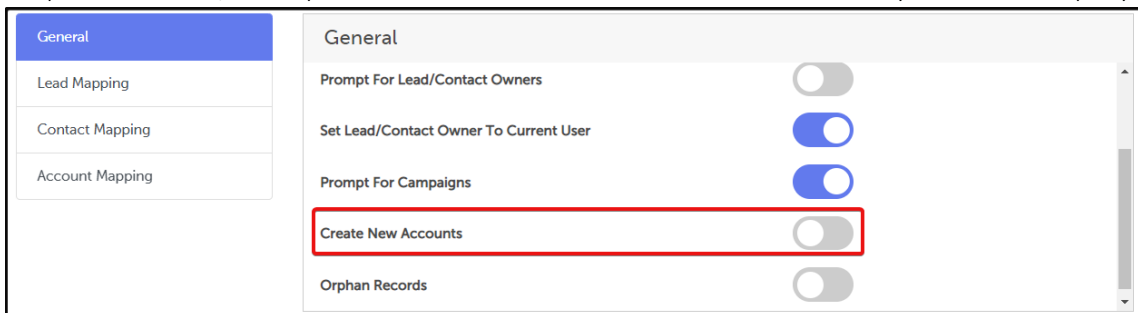
- d) **Set Lead/Contact Owner to current User** – you can enable to set the owner of the record to be under your name every time you export a record.



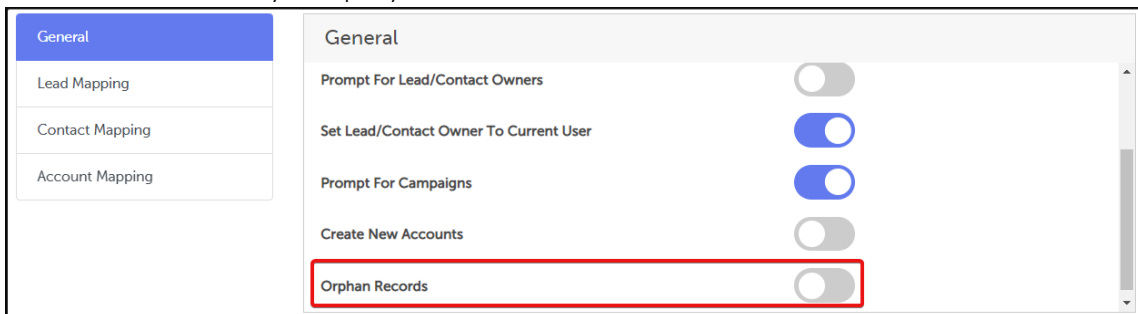
- e) **Prompt for Campaigns** – you can enable this option to prompt you in selecting an active Dynamics 365 Campaign during export. If disabled, the record will not be part of any campaign.



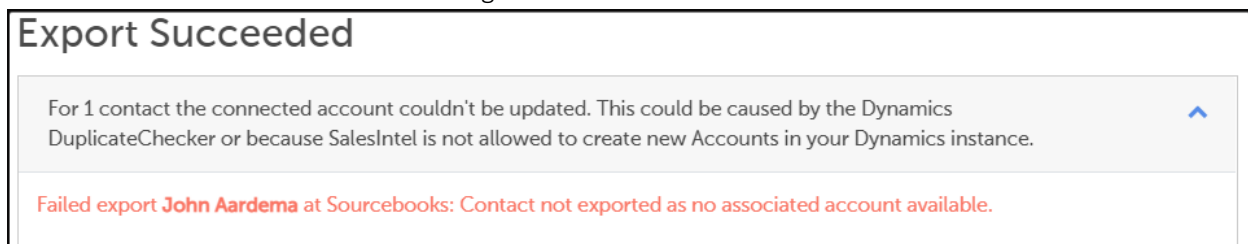
- f) **Create New Account** – this setting allows you to create an Account inside your Dynamics 365 for the associated account of the exported lead/contact. If disabled, you are required to enable “Orphan Records”, the exported lead/contact will not be associated with any account/Company.



- g) **Orphan Records** – this feature allows you to create a contact/lead to your Dynamics 365 that is not associated with any Company.



Note: If you try to export a Lead/Contact while the “Create New Account” and “Orphan Record” are disabled. You’ll receive the below message:



Record Mapping

You can set up the field mapping for all the record type that you want to export. There are separate settings for each record type. The **Allow Overwrite** checkbox is an option if you want SalesIntel Information to overwrite what you have inside your Dynamics 365 record. This option is also being used during Auto-Enhancement.

a) Lead Mapping

General	Lead Mapping		
Lead Mapping	SALESINTEL FIELD	DYNAMICS FIELD	ALLOW OVERWRITE
Contact Mapping	Prefix	Salutation	<input checked="" type="checkbox"/>
Account Mapping	First Name	First Name	<input checked="" type="checkbox"/>
	Last Name	Last Name	<input checked="" type="checkbox"/>
	Display Name	Name	<input checked="" type="checkbox"/>
	Job Title	Job Title	<input checked="" type="checkbox"/>

b) Contact Mapping

General	Contact Mapping		
Lead Mapping	SALESINTEL FIELD	DYNAMICS FIELD	ALLOW OVERWRITE
Contact Mapping	Prefix	Salutation	<input checked="" type="checkbox"/>
Account Mapping	First Name	First Name	<input checked="" type="checkbox"/>
	Last Name	Last Name	<input checked="" type="checkbox"/>
	Display Name	Full Name	<input checked="" type="checkbox"/>
	Suffix	Suffix	<input checked="" type="checkbox"/>

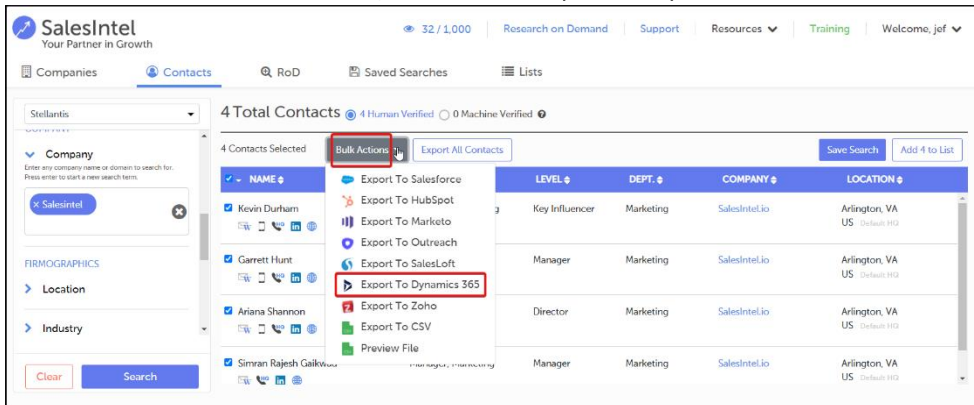
c) Account Mapping

General	Account Mapping		
Lead Mapping	SALESINTEL FIELD	DYNAMICS FIELD	ALLOW OVERWRITE
Contact Mapping	Primary Domain	Website	<input checked="" type="checkbox"/>
Account Mapping	HQ Phone	Address Phone	<input checked="" type="checkbox"/>
	Work Phone	Main Phone	<input checked="" type="checkbox"/>
	Street1	Address 1: Street 1	<input checked="" type="checkbox"/>
	Street2	Address 1: Street 2	<input checked="" type="checkbox"/>

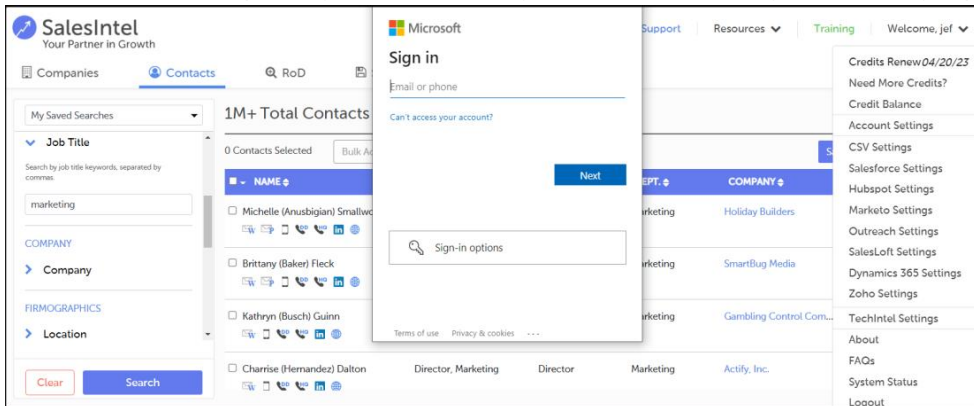
Exporting Contacts to Dynamics 365

Once you've logged into SalesIntel and selected the contacts you wish to export, follow the given steps:

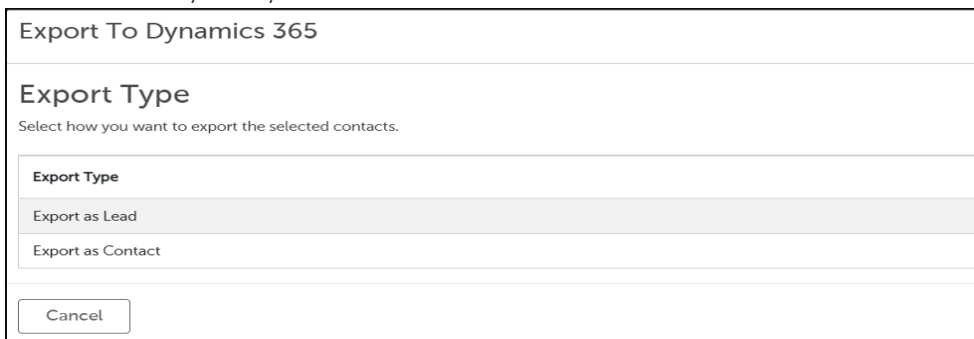
1. Click on **'Bulk Actions'** on the top left, select **'Export to Dynamics 365'** from the drop-down menu.



2. You'll be asked to log in to your Microsoft Dynamics365 account (If not already logged in).



3. When you set the **Export Type** to **Prompt**, select if you want the record to be exported as a **Lead** or a **Contact** to your Dynamics 365.



4. When you opt **Prompt for Lead/Contact Owners**, you'll get a list of Dynamics 365 owners to choose from. Select a lead owner/contact owner for your lead/contacts and click **Next**. This is optional.

Export To Dynamics 365

lead Owner (optional)

Select a lead owner for the selected contacts. This is optional.

Filter by name or email

Name	Email	
Alan Steiner	alans@Contoso.onmicrosoft.com	
David Mallory	davidm@Contoso.onmicrosoft.com	
jef test	jeffrey.jani@salesintel.io	✓
Jeremy Johnson	jeremy@Contoso.onmicrosoft.com	

Cancel Previous Next

- When you opt to **Prompt for Campaigns**, you'll have a list of active campaigns from your Dynamics 365.

Export To Dynamics 365

Campaigns (optional)

Select one or more campaigns you want to assign the selected contacts to. This is optional.

Filter by name

Name
1Q Regional Events
2Q Regional Events
3Q Regional Events
4Q Regional Events
Ad campaign
Ad campaign template

Cancel Previous Next

- If SalesIntel discovers any duplicate email addresses, you'll get a duplicate pop-up when you opt for **Prompt for Duplicate Resolution**.

Export To Dynamics 365

Duplicates

Found 1 duplicate:

Christopher Althausen

Resolve Duplicates by:

- Updating all fields
- Updating empty fields only
- Skipping duplicates

Cancel Previous Next

7. Based on the options you selected, the export process will begin. A success message will pop up and you're done. The contacts will be exported as Leads/contacts to your Dynamics 365 CRM.