



PREFERENCE MANAGER FOR MICROSOFT DYNAMICS

Implementation & Connectivity Overview



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1. INTRODUCTION

This document will provide you with an overview of the architecture of Preference Manager for Microsoft Dynamics CRM.

Preference Manager is a web application which allows your clients and prospects to sign up for your marketing communication as well manage their contact information and marketing preferences. The data input through Preference Manager is then passed into your Microsoft Dynamics CRM. Preference Manager is hosted in Concep's servers and does not require any installation on the client side besides the Microsoft Dynamics solution which provides fields required for Preference Manager, a security role that should be applied to the integration user and a dashboard where your marketing team can manage new registrations and updates.

2. SUPPORTED VERSIONS

Preference Manager supports both on-line and on-premises versions of Dynamics CRM 2013 and upward (including the Sales module for Dynamics 365).

3. PREREQUISITES

The list below contains the prerequisites for Preference Manager for Microsoft Dynamics integration.

- Microsoft Dynamics CRM 2013 or upwards (including the Sales module for Dynamics 365)
- Microsoft Dynamics CRM server configured for external access (only for on-premises). This server should, at least, match Microsoft's recommended minimum requirements to ensure good performance.
- 1 Microsoft Dynamics CRM Professional CAL (clients using the old licensing model) or 1 user with access to the sales model (Dynamics 365 licensing model) to be used by the integration service (no need to be dedicated)

4. INTEGRATION OVERVIEW

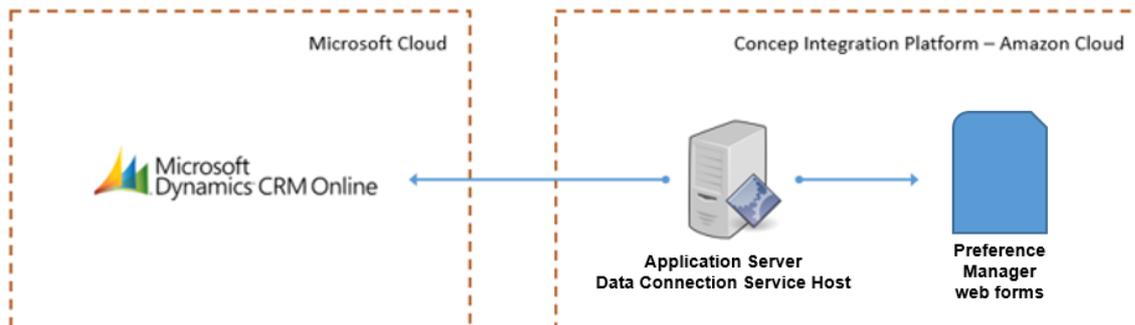
Deployment of Preference Manager will be managed by both the Client and Concep's implementation team. A typical implementation will consist of the following steps:

1. Client identifies what contact and preference fields are required for their Preference Manager, and makes any required changes to their CRM to accommodate the fields if necessary.
2. Preference Manager pages and email templates are created – this can be done by a Concep certified partner or by the client's creative agency.
3. Preference Manager pages are coded – this can be done by a Concep certified partner or by the client.

4. Concep Implementation team will configure Preference Manager for use by the client.
5. Sign Off
 - a. Client and Concep to test the data connection to ensure timely and accurate data flow

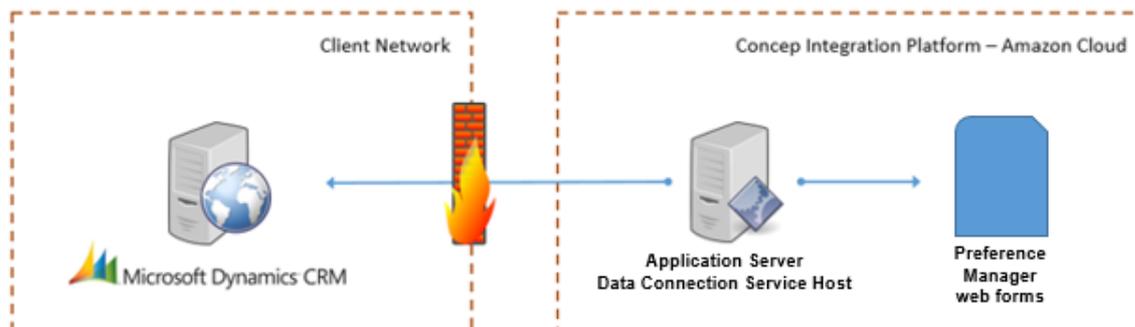
5. DATA CONNECTION SETUP – ONLINE CRM

For online versions of Microsoft Dynamics CRM, all that is required to set up the data connection is the address of your organization CRM. Our Implementation team will configure the connection on our platform and switch it on.



6. DATA CONNECTION SETUP – ON PREMISE CRM

Direct or “Zero Footprint” connectivity is implemented by Concep to ensure that we can fully offer software as a service (SaaS) in our approach to data integration and therefore continuously moving our technology forward. To integrate with your on-premises version of Microsoft Dynamics CRM, the configuration of an inbound connection is required and will need to be carried out by your IT team.



The following steps will need to be completed to enable Preference Manager to integrate with your CRM:

The following steps will need to be completed in order to enable Concep to integrate with your CRM:

1. Create the external URL

- Create an external facing URL for your instance of Dynamics CRM - This can be a subdomain of your business domain e.g. <http://dynamics.concep.com>.
- Create an A record for this domain that points to the external IP address of your Dynamics Web Server.

Please note:

- If your Dynamics CRM web server is within a secured zone, a reverse proxy route needs to be setup between an externally facing gateway and your Dynamics CRM web server.
- Concep supports the ADFS through the use of IFD. Check with your Microsoft Partner for more information on best practice for IFD set up

2. Allow HTTPS access

- Open an inbound port to accept HTTPS traffic only from Concep's server - this should be the standard port 443.
- Concep will provide the range of IP addresses to be allowed.

3. Apply the HTTPS certificate

- Obtain an external SSL certificate for the external facing URL created previously - If a subdomain is used then a wildcard SSL certificate can be used.
- Install the SSL certificate for the Dynamics CRM Website.
- Add secure bindings for the URL to the Dynamics CRM Web Client IIS.

7. DATA STORAGE & SECURITY

The connection details to your instance of Microsoft Dynamics CRM, and all passwords and other sensitive information will in addition be encrypted with unique salts for added security.

Data security is at the forefront of everything we do and Concep is fully compliant with ISO27001:2013 – Information Security Management certified.