



Confirmit CRM Connector User Guide

This is document revision 2 of the Confirmit Horizons v24 CRM Connector User Guide, published in March 2019. The information herein describes Confirmit Horizons CRM Connector and its features as of Confirmit Horizons Build nr. 24.0.804 (given in the **Home > Help > About** box). New features may be introduced into the product after this revision and build. Go to www.confirmit.com or check “News” on the Customer Extranet for the latest updates.

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The companies, names and data used or described in the examples herein are fictitious.

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What's New in this Revision?

Note: Only the latest changes to this documentation are listed here. Changes made to earlier revisions are listed in the "Changes to the User Documentation" document which can be downloaded from the Confirmit Extranet at <https://extranet.confirmit.com>.

- The text is edited and an Important note is added to the Transferring Data from MS Dynamics to Confirmit section (see Transferring Data from MS Dynamics to Confirmit on page 55 for more information).
- The Transferring Data from Confirmit to MS Dynamics section is added to the CRM Connector to Microsoft Dynamics chapter (see CRM Connector for Microsoft Dynamics on page 51 for more information).

Note: The general layout and language in this document is continually being corrected, adjusted and improved to ensure the user has the best possible source of information. Only NEW information and details of functionality that has changed since the previous issue are listed here - minor corrections to the text and document layout are not listed.

Important

We need your feedback so we can improve this document and provide you with the information you require. If you have any comments or constructive criticism concerning the content or layout of this documentation, please send an email to documentation@confirmit.com. Please include in your email the section number and/or heading text of the section to which your comment applies.

1. CRM Connector for Salesforce

The CRM Connector for Salesforce feature allows you to transfer data in both directions between Confirmit and Salesforce. This chapter describes the functionality and procedures.

Important

If you have any questions or you need assistance regarding the CRM Connector for Salesforce functionality, contact your Confirmit supplier or send an email to support@confirmit.com. The Salesforce company or supplier will not be able to assist you with the Confirmit application.

1.1. Accessing CRM Connector for Salesforce

To access CRM Connector, the feature must first be enabled in Confirmit, then a wizard will be accessible to guide you through the setup process.

1.1.1. Enabling the Feature in Confirmit

Contact your account manager to enable the feature for your company. This is necessary regardless of which version is being used.

1.1.2. Installing the Package to the Salesforce Environment (Horizons Version)

When using the standalone version of this feature, nothing needs to be installed or configured in your Salesforce environment. When a user first uses the wizard, he/she will log in to Salesforce and it will ask for permission so that CRM Connector can access Salesforce using that user's API access rights.

1.1.3. Installing the Package to the Salesforce Environment (AppExchange Version)

When using this product in the Salesforce AppExchange version, the Salesforce administrator should download and install the latest package from the AppExchange (find the Confirmit CRM Connector for Salesforce listing on the Salesforce AppExchange, and click on "Get it Now"). This feature is not intended for general business users, so we recommend that the managed package only be made visible to administrators by default.

Below are the steps to install and configure the CRM Connector for Salesforce application using the Salesforce lightning UI. Note that this AppExchange package works in both Lightning and Classic modes of the Salesforce UI, and either mode can be used for the installation.

1. Login to your Salesforce administrative account for the Salesforce org where you would like to use this feature.
2. Go to the Salesforce AppExchange website: <https://appexchange.salesforce.com>, and use the search to find the CRM Connector for Salesforce app listing.
3. Click the **Get It Now** button for the app listing to install it into your Salesforce org (it can be either a sandbox org. or a production org).
4. Select **Install for Admins Only** and click **Install**.

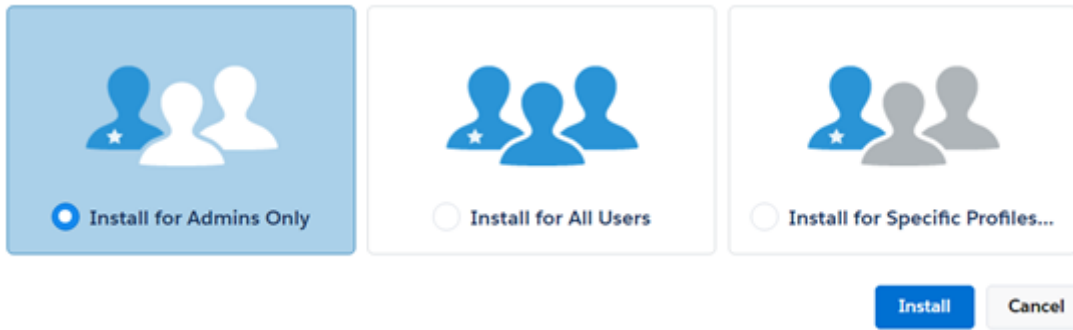


Figure 1 Installing for Administrators only

5. Wait while the installation process is completed.
6. Read the package description, then click **Done**.

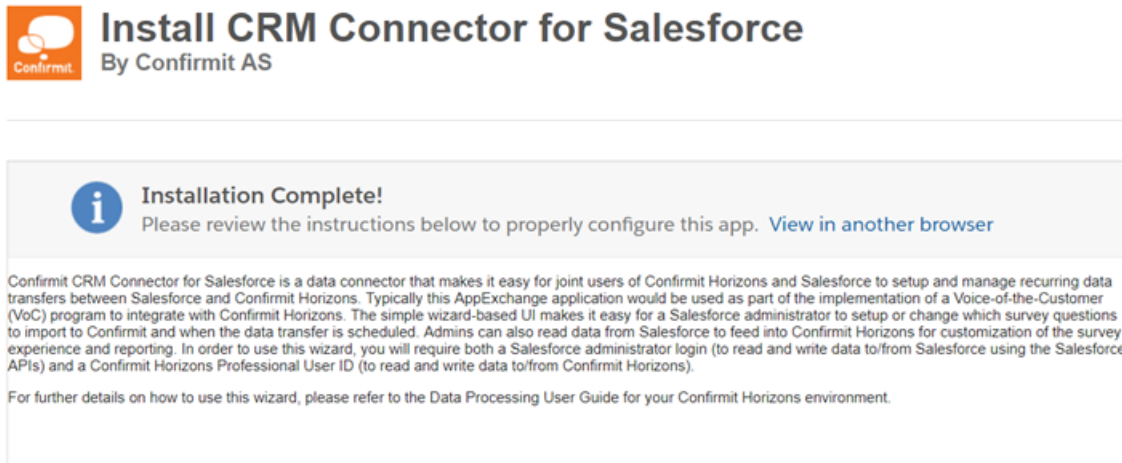


Figure 2 The package description

7. Open the Salesforce App Launcher and choose the 'CRM Connector for Salesforce' application.

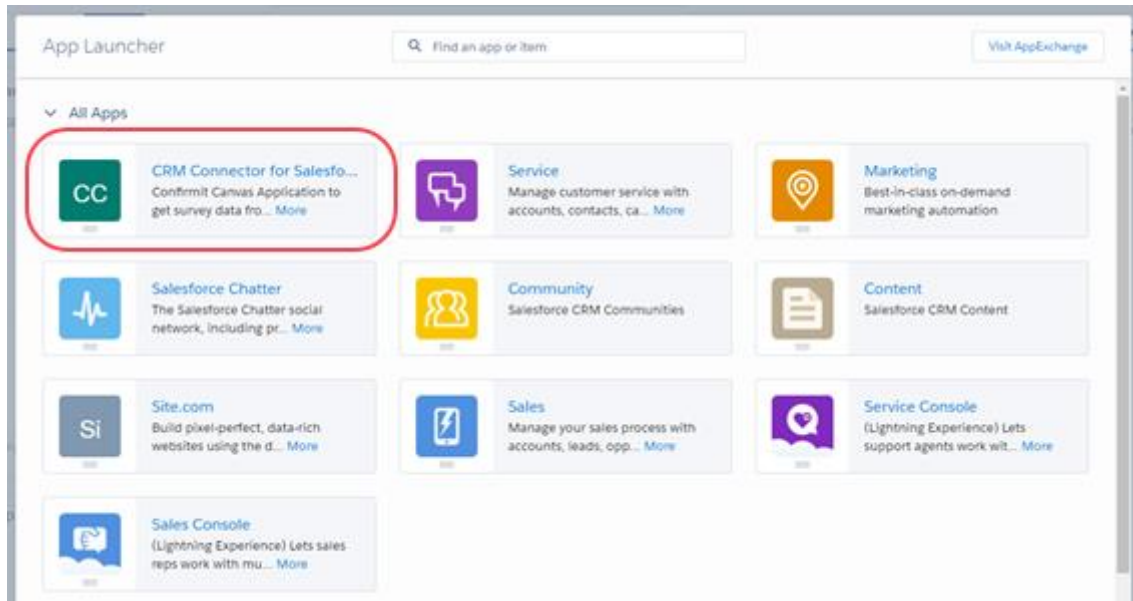


Figure 3 Choose the 'CRM Connector for Salesforce' application

8. Open the **Configuration** tab and select your Conformit SaaS environment from the drop-down menu.

The production environment will typically be either the European, US, or Australian Conformit site. However, during trials the Nordics environment can be used, and all customers can access CRM Connector in our non-production Testlab environment for experimentation.

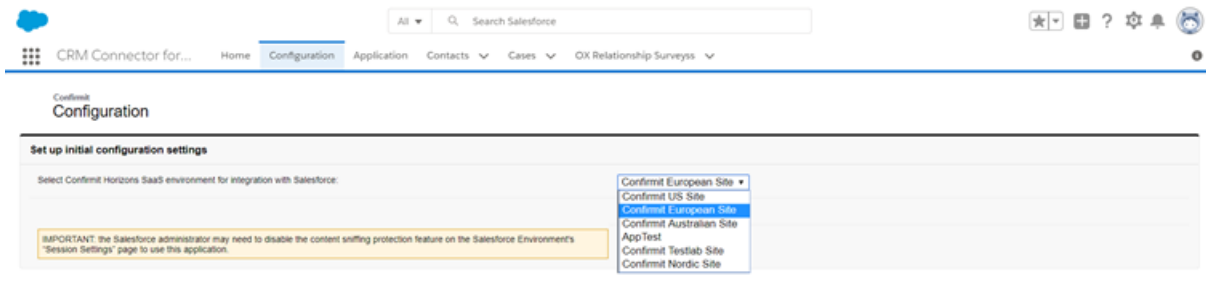


Figure 4 Selecting the site

9. Open the **Application** tab.

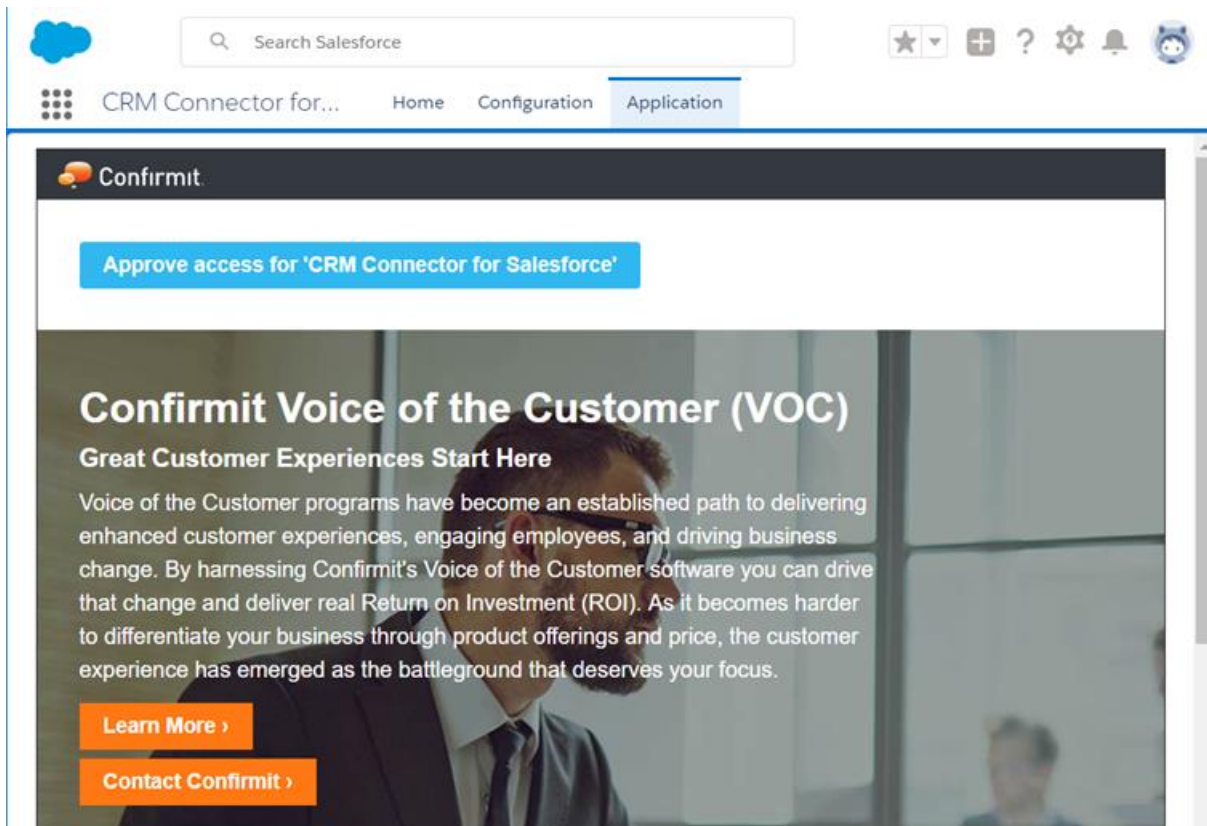


Figure 5 The Application tab

This is a one-time approval step to authorize your Confirmit environment to connect with your Salesforce environment under your user credentials.

10. Click **Approve access for 'CRM Connector for Salesforce'**.

The standard Salesforce dialog box 'Allow Access' opens in a separate window.

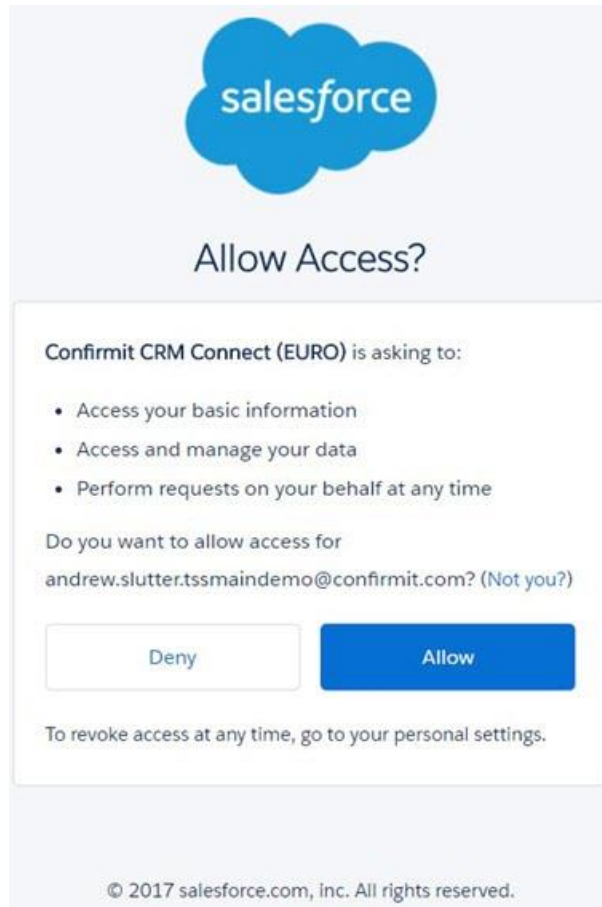


Figure 6 The Allow Access dialog

11. Click **Allow**.

The 'Allow access' dialog will close and you will be redirected to the CRM Connector for Salesforce application. You will now be asked to log in to Confirmit.

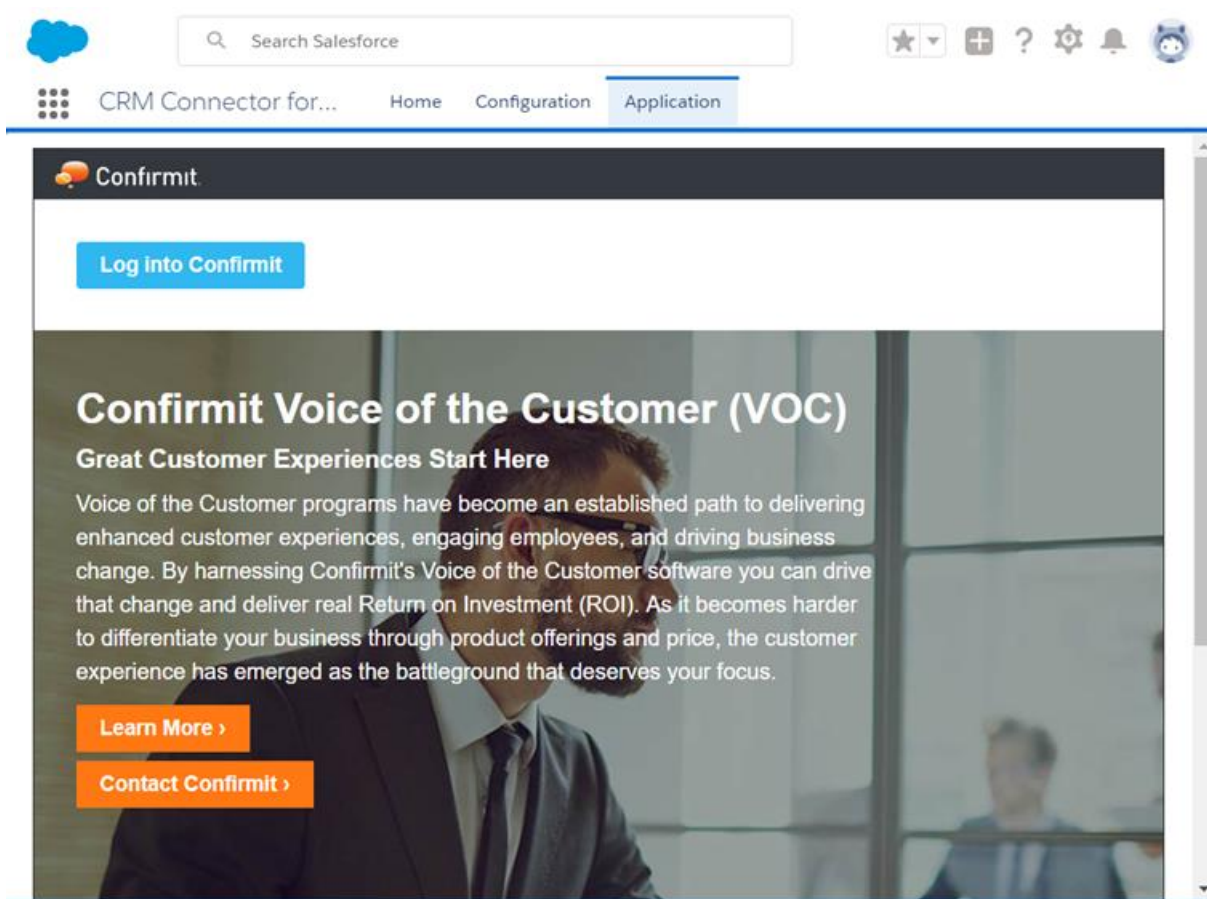


Figure 7 You will be asked to log in to Confirmit

12. Click **Log into Confirmit**.
The Confirmit Login overlay opens.

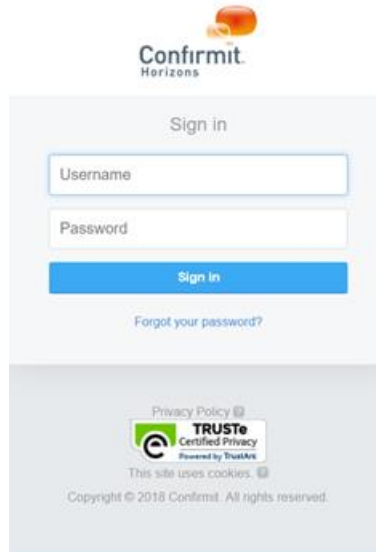


Figure 8 The Confirmit Login overlay

13. Enter your Confirmit username and password, then click **Sign in**.

You are now logged in to Confirmit and ready to start using CRM Connector for Salesforce within your Salesforce environment. You will see the Job List view in the iframe Salesforce.

1.1.4. Accessing the Wizard (Horizons Version)

No AppExchange installation process is required in the Horizons mode. To access the wizard:

1. From Survey Designer (or another module), select **CRM Connector** from the global navigation menu. Note that the option will only appear if the feature is enabled for your company.

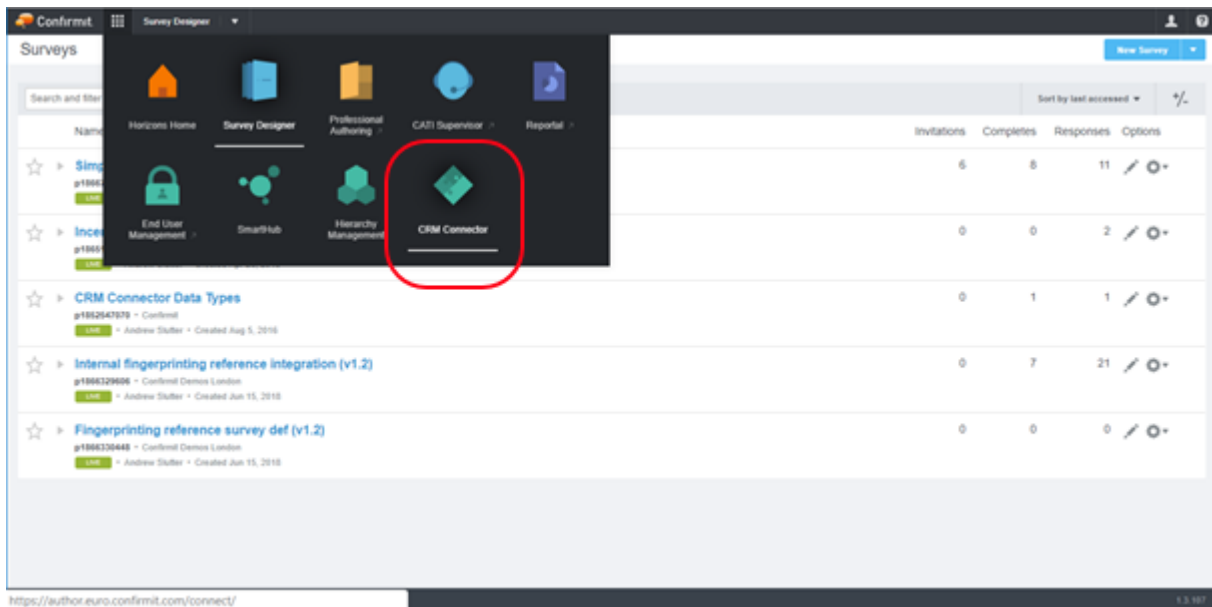


Figure 9 The CRM Connector link in Survey Designer

- Alternatively, from the Horizons home page, click on the **CRM Connector** icon. Again, the option will only appear if the feature is enabled for your company.

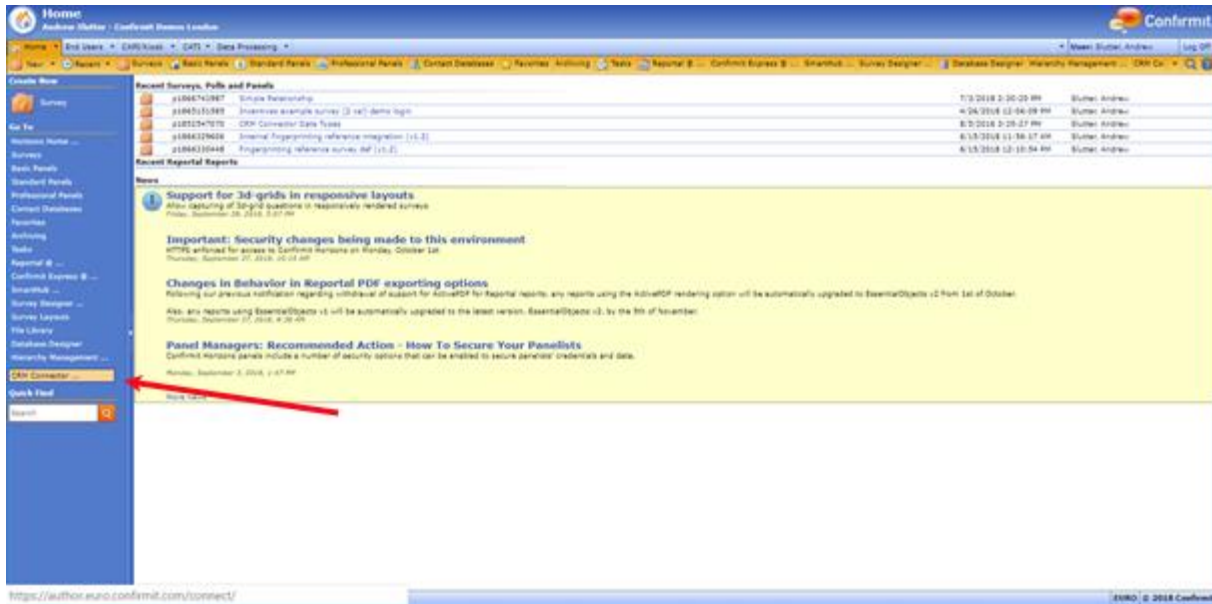


Figure 10 The CRM Connector link in Authoring

1.1.5. Accessing the Wizard (AppExchange Version)

The AppExchange version is an iframe around the Horizons Standalone Version. The wizard should be used by a Salesforce administrator, not a general business user.

- After logging into Salesforce, select the CRM Connector for Salesforce App from your list of Apps.
- Select the **Application** tab on the CRM Connector for Salesforce App.
You will see the wizard in the iframe.
- Log into Confirmit
The Job List View appears.

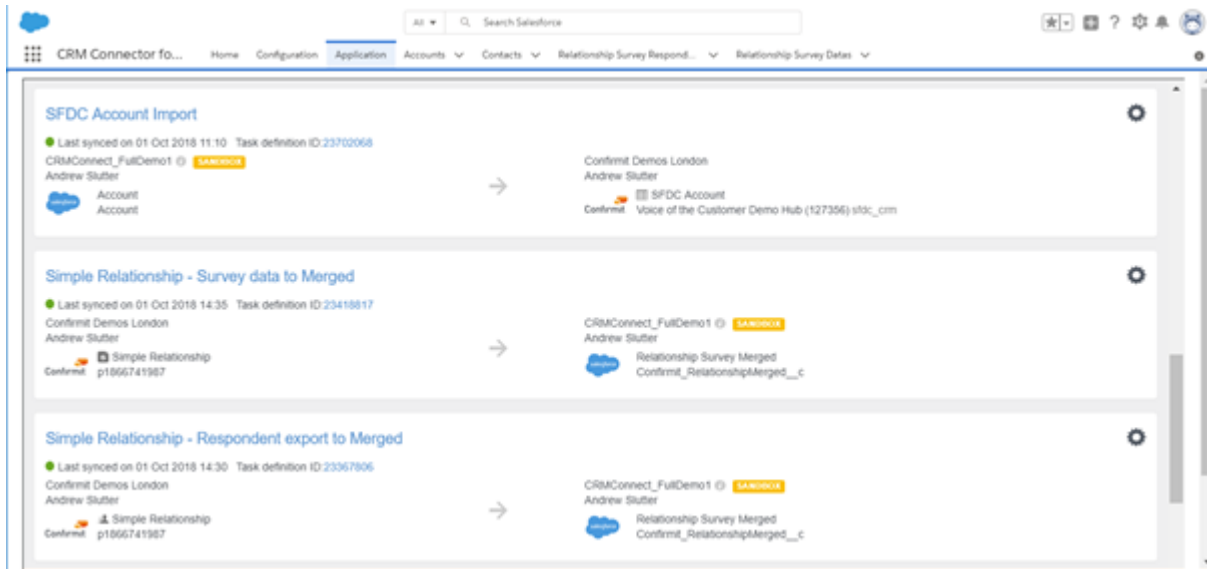


Figure 11 Example of the Job List View page

1.1.6. Job List View

The starting page for this AddOn (in either version) is the job list view. Here you will see any CRM Connector jobs listed which have been setup under your Confirmit login to transfer data to any Salesforce environment.

Note: If you have setup logins to both a production and sandbox Salesforce environment then all of these jobs will appear in the list. However those which are not setup under the current logged-in Salesforce account will be labeled “Not in current account”.

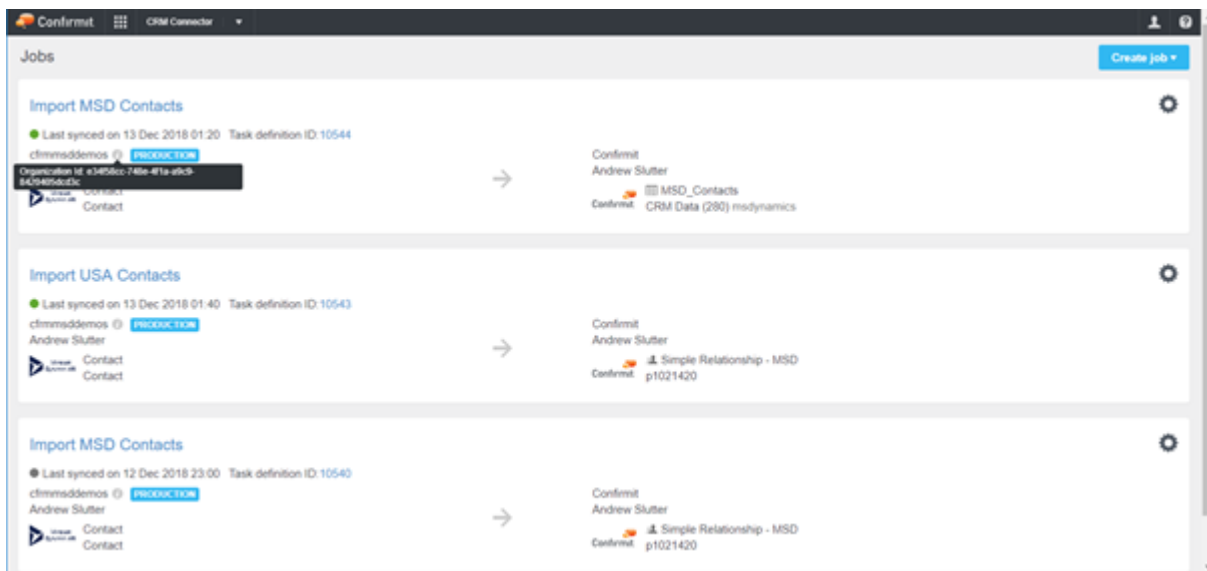


Figure 12 Example of the Job list

For each job in the job list, the following information is provided:

- The Job Label - a description of the data transfer job.

- Information on recent data synchronization – for recurring transfers, the time and date of the most recent synchronization is shown. If that transfer succeeded there is a green circle. If that transfer failed there is a red circle. If the job is not setup to recur the circle will be grey.
- The task definition ID – this number is a link to the logs associated with this job. You can click on this link to view the detailed history of this job in the Confirmit Horizons task system.
- The Confirmit Horizons Company name for the Confirmit Horizons User.
- The Confirmit Horizons User Name.
- The Confirmit Horizons Survey Name (Import jobs write in to this survey, whereas export jobs read from this survey).
- The Confirmit Horizons Survey ID.
- The Salesforce environment organization name.
- The Salesforce org id – hover over the info icon to see this id.
- The Salesforce Object Name (Import jobs read from this primary object, whereas export jobs write to this object).
- The Salesforce Object ID.
- An icon identifies the Salesforce environment either as a Sandbox org or a Production org.
- An icon identifies the Confirmit source table type for exports or the target table for imports – The  icon indicates you are exporting from the Confirmit Horizons respondent table into Salesforce, or importing into the Confirmit Horizons respondent table from Salesforce. The  icon means you are exporting Confirmit Horizons survey response data into Salesforce. The  icon means you are importing data from Salesforce into a Confirmit Horizons custom data table.
- Log in button – if you have not logged into Salesforce, you may see a log-in button on the Salesforce job. Click this to log in to Salesforce so that you can change the job or see additional details about it.
- Information / warning messages – if the Confirmit Horizons survey has been archived or deleted you may see a warning message about that. Similarly if the Salesforce object associated with a job is not accessible or deleted you may see a message about that, too.

In cases where you are logged into a different Salesforce environment than the one associated with a CRM Connector job, some information about the Salesforce environment and object may not be accessible.

Note that for each job there is also an expandable menu of Actions on the right side of the page. These actions allow you to manage the jobs, edit them, or delete them if they are no longer needed.

1.1.7. Logging In to Salesforce

When using CRM Connector for Salesforce, at various times you may need to log into Salesforce in order to see information stored in the Salesforce environment or make changes to it. When a Salesforce login is required, you will be presented with the following login screen:

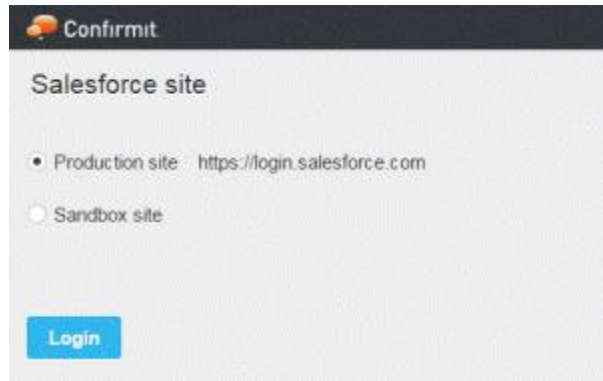


Figure 13 Selecting the Salesforce environment

1. Select the Salesforce environment you wish to log in to (it may be a production Salesforce org, or a sandbox Salesforce org; both are supported):
 - o Production site: use this option to log in to a production Salesforce environment.
 - o Sandbox site: use this option to log in to a sandbox Salesforce environment if you are doing some testing before creating the link in your production environment.
2. Enter your Salesforce login credentials and click **Log In**.

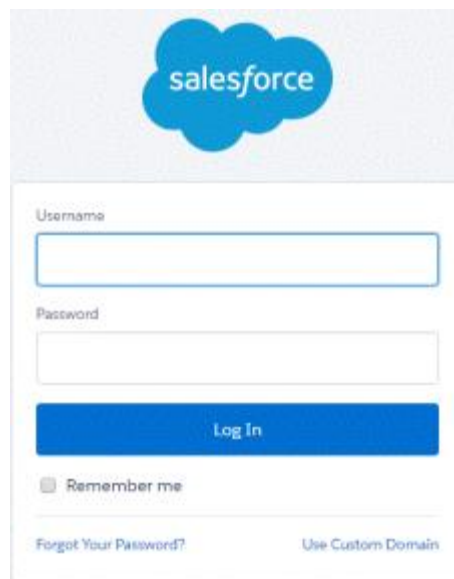


Figure 14 The login page

After you click Log In, you will then be logged into Salesforce and can proceed with the next step to use the feature.

1.2. Transferring Data from Salesforce to Confirmit

Note: CRM Connector for Salesforce is a company add-on and is subject to payment. If your company has not licensed the add-on then the CRM Connector for Salesforce link will not be visible on your home page. Refer to the Confirmit Acceptable Usage Policies (AUP) for further details. Only Chrome and Firefox browsers are currently supported.

CRM Connector for Salesforce (Salesforce to Confirmit) enables you to setup and manage recurring jobs to import CRM data from Salesforce into Confirmit Horizons through an easy-to-use wizard. The imported CRM data can either be added to the survey's respondent table, or it can be imported into a custom data table. Once CRM data is in the respondent table, the data can feed into Confirmit for a variety of uses: personalization of e-mail invitations, capture as background variables in surveys to personalize survey flow and survey experience, feed into Confirmit action management, or feed into Confirmit data visualization and reporting tools. On the other hand, when CRM data has been loaded into custom data tables, it is easily accessed from Studio reporting via CDL. One advantage of custom data tables is that they can import larger text data, whereas the respondent table only allows text fields of up to 255 characters.

There are currently two import work flows available as part of the CRM Connector for Salesforce AddOn package. This section discusses the new work flow. New users should always use this new work flow rather than the older Flex extension work flow (described later in this chapter) because support for the older Flex extension work flow will soon be withdrawn. The advantages of the new flow are that it:

- Supports more simultaneous jobs per Salesforce user (although it is still constrained by Salesforce API limits).
- Allows the user to directly edit the SOQL query, which means a single job can import data from multiple related objects from Salesforce into Confirmit, and that more complex filtering is possible.
- Supports additional options for adding data into the respondent table (for example in addition to an insert operation, it is now possible to append or merge new records). This includes support for a composite key during insertion.
- Simplified flow for setting up and managing the schedule of recurring tasks.
- Allows import of data into custom data tables.

This feature is available in two versions with nearly identical functionality:

1. Standalone (Horizons) version - this version is accessed via your Horizons platform. This version can be more convenient if you want to switch between multiple Salesforce environments (for example multiple sandboxes and production environments).
2. Salesforce AppExchange version - this version has identical capabilities to the standalone version, but it is accessible from inside Salesforce and distributed via a Salesforce AppExchange App (managed package). This package is an iframe around the standalone version. In this version you cannot switch between Salesforce environments.

Both versions of this feature require two user logins:

1. Confirmit Horizons Professional Authoring login
2. Salesforce login

Note: Your access to Salesforce data is controlled via the Salesforce user's settings inside Salesforce. If your Salesforce user is not a full administrative user and you are unable to see some Salesforce objects or fields inside CRM Connector for Salesforce, please review the Salesforce user's field-level access rights.

Note: The Horizons API user included in the CRM Connector for Salesforce package is only for use with the Flex import flow, and not this work flow. The API user does not work for this work flow.

Important

Access to your Salesforce data is governed by Salesforce's Acceptable Usage Policies (AUP). To maintain optimum performance and ensure that the Salesforce API is available to all Salesforce customers, Salesforce imposes daily API usage limits. It is your responsibility to ensure that you do not exceed your Salesforce API usage limits. If you exceed the limits, it could temporarily disable CRM Connector as well as your other Salesforce integrations.

1.2.1. The Procedures

There are three main procedures for this feature:

- Set up a new data transfer job to a respondent table (see How to Set Up a New Data Transfer Job (Salesforce to Confirmit Respondent Table) on page 13 for more information).

- Set up a new data transfer job to a custom data table (see How to Set Up a New Data Transfer Job (Salesforce to Confirmit Custom Data Table) on page 20 for more information).
- Modify the SOQL query or field mapping of an existing data transfer job (see How to Modify an Existing Job Field Mapping (Salesforce to Confirmit) on page 26 for more information).

1.2.1.1. How to Set Up a New Data Transfer Job (Salesforce to Confirmit Respondent Table)

Create the job

1. In the **Create job** menu in the upper-right corner of the Job List, select **Salesforce to Confirmit**.
2. Select **Respondent table** from the **Target type** drop down menu to define where the CRM data should be stored.
3. Enter a job name to uniquely identify this job.
4. Select the target survey into which you will import the CRM data.
5. Click **Next** to proceed.

The data will be imported into the survey's respondent table.

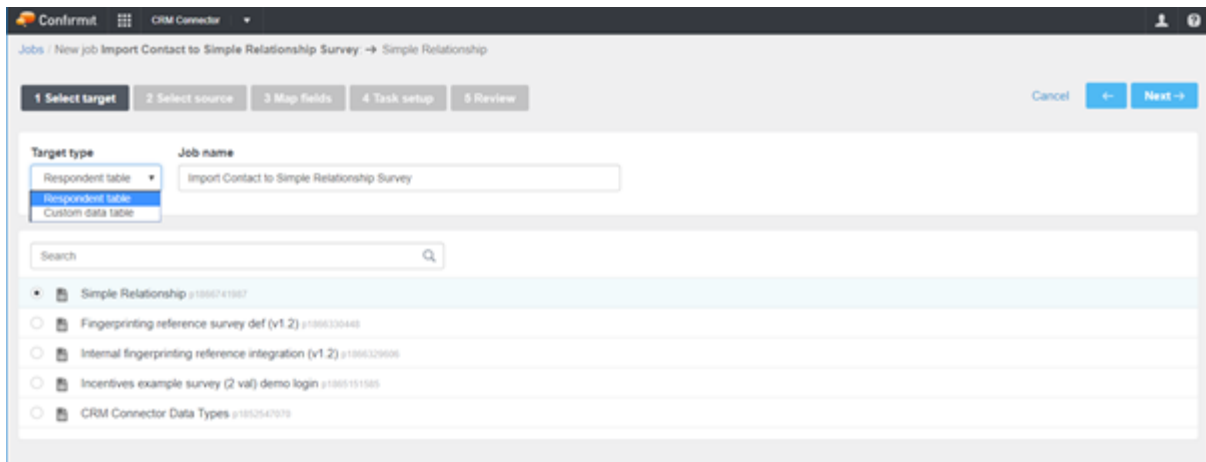


Figure 15 Selecting the target survey

Important

The field width on the respondent table is limited to 255 characters. If you plan to import text data from Salesforce and the field width in Salesforce is larger, then the text will be truncated during import.

Define which Salesforce data fields to import

You will define a SOQL query to specify which data fields will be exported from Salesforce and imported into Confirmit Horizons. You can use the SOQL builder UI to generate the query, and you can edit the SOQL query directly using the SOQL editor. You can also switch between the SOQL builder and editor so that you have the ability to adjust or modify the basic query generated by the SOQL builder. After this query has been defined, you will map the selected Salesforce fields to Confirmit Horizons fields.

1. First, decide which Salesforce records you wish to include when you import data from Salesforce to Confirmit:
 - **All records** - in this mode, all records matching the SOQL query will be imported

- **New records** - in this mode, any records that match the SOQL query will be imported, but the query should be written so that only records that were created since the last transfer will be included. When selected, the SOQL builder flow will automatically generate the query with an appropriate filter condition using the special macro called :LAST_SYNC_DATETIME.

Example: `SELECT id FROM Contact WHERE CreatedDate > :LAST_SYNC_DATETIME`

- **Changed records** - in this mode, any records that match the SOQL query will be imported, but the query should be written so that only records that were changed or created since the last transfer will be included. When selected, the SOQL builder flow will automatically generate the query with an appropriate filter condition using the special macro called :LAST_SYNC_DATETIME.

Example: `SELECT id FROM Contact WHERE SystemModstamp > :LAST_SYNC_DATETIME`

When the SOQL query is executed, if you have used :LAST_SYNC_DATETIME, the macro will be replaced with the actual date-time when CRM Connector most recently ran. This makes it much easier for you to setup queries that will only import records that were recently edited or changed.

If the query has never run before, then it will be replaced with a date-time at the beginning of the epoch and it will initially include all historical records in the query response.

2. Use the **SOQL Builder** to generate your query

- o Select a primary Salesforce query object from which data will be imported. When you select the object, the list of fields available on that object is shown in the Salesforce field list menu.
- o Select which Salesforce field(s) should be imported using the field list menu. You can filter the list to more easily search for a field. The field names shown are the Salesforce API names (not the Salesforce field labels). Use the > button to add the fields you want to import to the list of fields to transfer.
- o (Optional) Add filter criteria to be applied when selecting the records. If filters are defined, only query results matching the filter(s) will be included in the transfer. First, select the field name from the list of available fields. The fields listed are the API names of the fields on the primary query object; in parenthesis next to each field is the Salesforce data type. Next, select a filtering operator from the list of choices (ie =, !=, etc). Finally, add the filter criteria. You can add multiple filters, which will be all be applied to the query. . In the example figure a filter is added to exclude any records with MailingCountry set as 'United Kingdom'

As you make changes in the SOQL builder, the changes are reflected in the SOQL editor. If you have selected «New Records» or «Changed Records», then an appropriate filter condition is added automatically to the query, too.

Note: some Salesforce field data types (eg Address and Geolocation) are not supported, so they cannot be selected and appear greyed out in SOQL Builder. For example, in Figure 131, MailingAddress is greyed out for this reason..

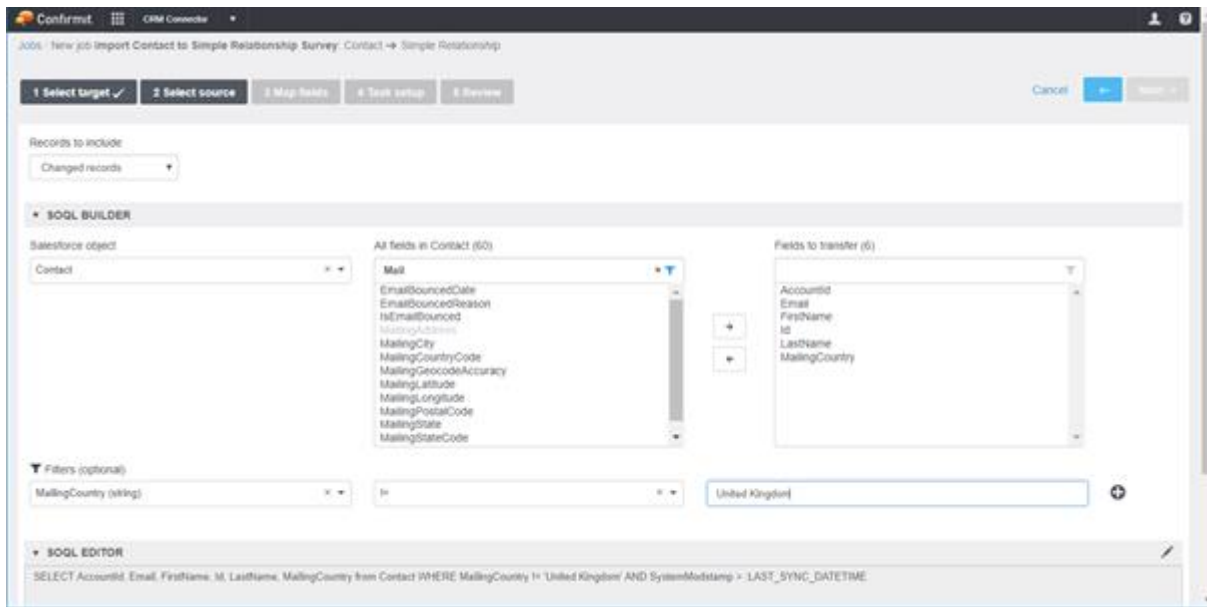


Figure 16 Defining query with SOQL Builder

3. (Optional) Manually edit the query using the SOQL Editor

If you want to change the query created by the SOQL builder, you can update the query using the SOQL editor. To switch to the SOQL editor, click on the **Pencil** icon in the upper right corner of that region on the page. One reason to change the SOQL might be if you want to import data from fields on objects related to the primary object via a Lookup relationship or a Parent relationship. In Figure 132, we have added Account.Name and Account Industry, as examples of references to fields on a related object. In this case, these fields are not on the Contact object, but instead sit on the Account object; the Account object is related to the Contact object via the Account Lookup relationship. So, this is how SOQL approaches multi-object queries.

If you have selected «New Records» or «Changed Records», you still need to use :LAST_SYNC_DATETIME as part of the filter conditions of your query. However, you could change it to use a different filter criteria than the default generated by the SOQL builder.

When the Job is actually submitted, we replace the :LAST_SYNC_DATETIME with the date-time when CRM Connector most recently ran. This makes it much easier for you to setup an integration that only imports records that were recently edited or changed since the last data transfer.

4. Click the **Test Query** button to submit your query to Salesforce to test it.

You must test the query before proceeding to the next step to map the fields selected in the query. When you test the query, it is submitted to the Salesforce API, and the first 200 records of the query response are displayed so you can check to see that the query behaves as expected. If there is an error in the query or with the Salesforce platform, a message is displayed.

Important

Salesforce SOQL queries can timeout. If your query is too complex or Salesforce has too much load on the system when you submit the query and it cannot be completed, it will fail. This could also happen when running the query in batch mode. If the query is timing out, consider optimizing the table structure in Salesforce or simplifying the query. Work with your Salesforce administrator and Salesforce customer support to resolve this sort of SOQL performance issue.

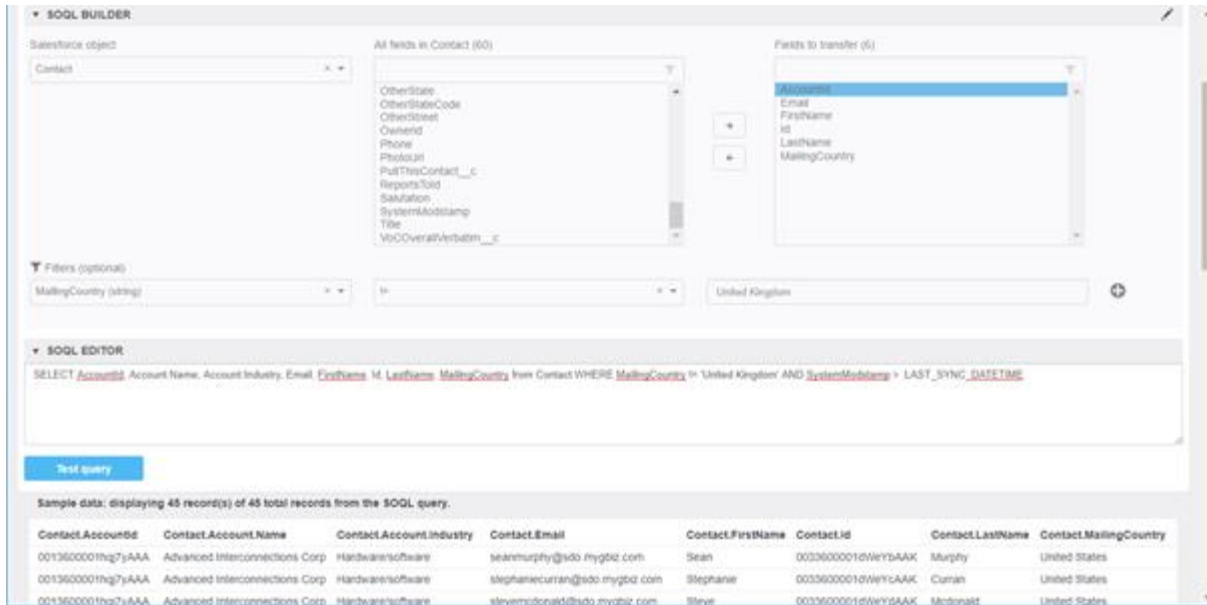


Figure 17 Editing a query with SOQL editor and viewing sample data returned by a query

- Once you are satisfied with your query, click **Next** to proceed.

Map the selected Salesforce fields to Horizons fields

Now that you have selected the fields for import via the SOQL query, they need to be mapped to fields in the Confirmit respondent table.

- Select the Import mode from the available choices:
 - Insert** – in this mode, Salesforce data retrieved via the SOQL query will be added as new records to the respondent table.
 - Append** – in this mode, Salesforce data retrieved via the SOQL query will only be added if there is not already a respondent record matching the defined key. For this option a key field must be defined in the mapping.
 - Merge** – in this mode, Salesforce data retrieved via the SOQL query will be added if there is not already a respondent record matching a defined key, and if there is an existing record matching the defined key then the existing record will be updated with the SOQL query results. For this option a key field must be defined in the mapping.

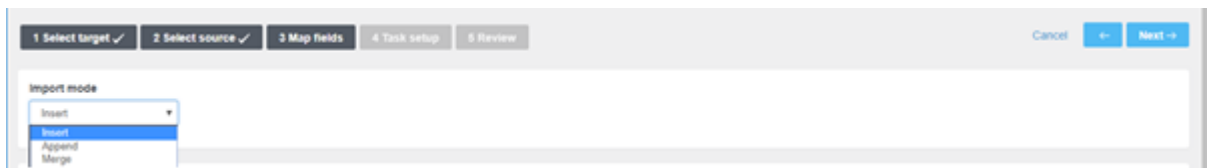


Figure 18 Selecting the import mode

- Map the Salesforce fields to Confirmit fields.
Choose the desired mapping option for each field from the menu in the Action column.
 - If you choose **Create new**, then you provide a new respondent field name, and the Salesforce field will be mapped to a new respondent field that will be created with that name.

- o If you choose **Link to**, then you select an existing respondent field name and the Salesforce field will be mapped to that existing respondent field.

Salesforce field	Salesforce type	Action	Respondent field	Key field
Contact.AccountID	reference	link to	AccountID	KEY
Contact.AccountName	Text (255)	link to	AccountName	KEY
Contact.AccountIndustry	Picklist	link to	AccountIndustry	KEY
Contact.Email	Email	link to	email	KEY
Contact.FirstName	Text (80)	link to	FirstName	KEY
Contact.LastName	Text (80)	link to	LastName	KEY
Contact.MailingCountry	Text (30)	link to	MailingCountry	KEY

Figure 19 Mapping the fields

3. (Optional) Select a key

- If you have selected **Append** or **Merge** as the respondent table Import Mode then you must define a key field so that it is clear which is to be used as the unique record. For these two import modes, the Key Field column becomes available. To select a field as the key, click on the **Key** button in the row containing the key field. It is important that the key field is unique; if it is not then this process will not work correctly. Duplicates can be created when switching between the import modes, particularly when adding a key definition, so it is recommended that you set this aspect of a job and then do not change it.

Sometimes one key is not enough to make each record unique, and a composite key field is required. For example, a composite key is useful for an annual Voice of the Customer relationship survey. In this case you might only survey the Contact once per year. Salesforce has a unique ContactID, however when you run the survey program over multiple years you also need to survey that Contact over multiple years, so the ContactID cannot be used as the unique key by itself. In this case you could create a composite key of ContactID + Year.

To define a composite key, click on the **Key** button for multiple fields, and they will be combined to form a composite key.

Salesforce field	Salesforce type	Action	Respondent field	Key field
Contact.AccountID	reference	link to	AccountID	KEY
Contact.Account Name	Text (255)	link to	AccountName	KEY
Contact.Account Industry	Picklist	link to	AccountIndustry	KEY
Contact.Email	Email	link to	email	KEY
Contact.FirstName	Text (80)	link to	FirstName	KEY
Contact.Id	ID	link to	ContactID	KEY
Contact.LastName	Text (80)	link to	LastName	KEY
Contact.MailingCountry	Text (30)	link to	MailingCountry	KEY

Figure 20 Defining a composite key field

2. When you have completed the field mapping, click **Next** to proceed.

Set up the task

Each job creates a data processing task within the Confirmit data processing environment to execute the data transfer.

1. Define when the data should be transferred:
 - o **Off (Sync manually)** - the task will be setup and saved but will not actually run. Use this when you plan to start running the task later.
 - o **Scheduled** - you may choose to run the job hourly, daily, weekly, monthly, or one time only. Select the data and time when the job is to run.

Figure 21 Setting up the task

Review and complete the setup

Before completing the job setup, review the job information. Check that the job will run when expected. Make sure the SOQL query includes all the fields and filtering criteria that you require. Make sure the Salesforce fields are mapped to the expected Confirmit respondent table fields, and that any key fields are properly identified. If you need to fix anything you can go back to change it in the wizard before accepting the job.

1. Click **Complete setup** to save your job. You will then be taken to the Job Overview page of your new job.

SOQL Query:
 SELECT AccountId, AccountName, AccountIndustry, Email, FirstName, Id, LastName, MailingCountry from Contact WHERE MailingCountry In 'United Kingdom' AND SystemModstamp > LAST_SYNC_DATETIME

Salesforce field	Salesforce type	Action	Respondent field	Key
Contact.AccountId	reference	LinkTo	AccountID	KEY
Contact.AccountName	Text (255)	LinkTo	AccountName	
Contact.AccountIndustry	Picklist	LinkTo	AccountIndustry	
Contact.Email	Email	LinkTo	email	
Contact.FirstName	Text (40)	LinkTo	FirstName	
Contact.Id	Id	LinkTo	ContactID	KEY
Contact.LastName	Text (80)	LinkTo	LastName	
Contact.MailingCountry	Text (80)	LinkTo	MailingCountry	

Figure 22 Example of the Job Overview page

1.2.1.2. How to Set Up a New Data Transfer Job (Salesforce to Confirmit Custom Data Table)

Create the job

1. In the **Create job** menu in the upper-right corner of the Job List, select **Salesforce to Confirmit**.
2. Select **Custom data table** from the **Target type** drop down menu to define where the CRM data should be stored.
3. Enter a job name to uniquely identify this job.
4. Select the Hub where the custom data table for storing CRM data will be located. You have a choice of the existing Hubs available to the Horizons user.
5. To write into an existing custom table, select **Existing tables** (ringed below), and select the dataset and custom data table where you want to store the CRM data.

The screenshot shows the '1 Select target' step of the 'New job Import Contact to VoC Hub Custom Table' workflow. The 'Target type' is 'Custom data table' and the 'Job name' is 'Import Contact to VoC Hub Custom Table'. Under 'In hub', 'Voice of the Customer Demo Hub' is selected. Under 'In dataset', 'sfdc_crm' is selected. The 'Existing tables' radio button is selected and circled in red. Below, a search bar and a list of datasets are shown, with 'SFDC Contact (SFDC_Contact)' selected.

Figure 23 Selecting to use an existing custom data table

To write into a new custom data table, select **Create new table** (ringed below), select the dataset or create a new one, and provide a label and name for the new custom data table.

The screenshot shows the 'Jobs / New job Import Contact to VoC Hub Custom Table -> SFDC_Contact (Voice of the Customer Demo Hub demo_crm)' window. The interface has a top navigation bar with '1 Select target', '2 Select source', '3 Map fields', '4 Task setup', and '5 Review' tabs. Below this, there's a 'Target type' dropdown set to 'Custom data table' and a 'Job name' field containing 'Import Contact to VoC Hub Custom Table'. The 'In hub' section shows 'Voice of the Customer Demo Hub' selected. Under 'Existing tables', the 'Create new table' option is selected and circled in red. The 'Label' field contains 'SFDC_Contact' with a note 'Used in Studio reports and SmartHub'. The 'Name' field contains 'SFDC_Contact' with a note 'Used in Studio scripting'. The 'Dataset' section has 'New' selected with 'demo_crm' in a text box, and 'sfdc_crm' is also listed as an option.

Figure 24 Selecting to create a new custom data table

6. Click **Next** to proceed.

The data will be imported into the survey's respondent table.

Define which Salesforce data fields to import

You will define an SOQL query to specify which data fields will be exported from Salesforce and imported into Confirmit Horizons. You can use the SOQL builder UI to generate the query, and you can edit the SOQL query directly using the SOQL editor. You can also switch between the SOQL builder and editor so that you have the ability to adjust or modify the basic query generated by the SOQL builder. After this query has been defined, you will map the selected Salesforce fields to Confirmit Horizons fields.

1. First, decide which Salesforce records you wish to include when you import data from Salesforce to Confirmit:
 - **All records** - in this mode, all records matching the SOQL query will be imported
 - **New records** - in this mode, any records that match the SOQL query will be imported, but the query should be written so that only records that were created since the last transfer will be included. When selected, the SOQL builder flow will automatically generate the query with an appropriate filter condition using the special macro called :LAST_SYNC_DATETIME.

Example: `SELECT id FROM Contact WHERE CreatedDate > :LAST_SYNC_DATETIME`

- **Changed records** - in this mode, any records that match the SOQL query will be imported, but the query should be written so that only records that were changed or created since the last transfer will be included. When selected, the SOQL builder flow will automatically generate the query with an appropriate filter condition using the special macro called :LAST_SYNC_DATETIME.

Example: `SELECT id FROM Contact WHERE SystemModstamp > :LAST_SYNC_DATETIME`

When the SOQL query is executed, if you have used :LAST_SYNC_DATETIME, the macro will be replaced with the actual date-time when CRM Connector most recently ran. This makes it much easier for you to setup queries that will only import records that were recently edited or changed.

If the query has never run before, then it will be replaced with a date-time at the beginning of the epoch and it will initially include all historical records in the query response.

2. Use the **SOQL Builder** to generate your query

- o Select a primary Salesforce query object from which data will be imported. When you select the object, the list of fields available on that object is shown in the Salesforce field list menu.
- o Select which Salesforce field(s) should be imported using the field list menu. You can filter the list to more easily search for a field. The field names shown are the Salesforce API names (not the Salesforce field labels). Use the > button to add the fields you want to import to the list of fields to transfer.
- o (Optional) Add filter criteria to be applied when selecting the records. If filters are defined, only query results matching the filter(s) will be included in the transfer. First, select the field name from the list of available fields. The fields listed are the API names of the fields on the primary query object; in parenthesis next to each field is the Salesforce data type. Next, select a filtering operator from the list of choices (ie =, !=, etc). Finally, add the filter criteria. You can add multiple filters, which will be all be applied to the query. In the example figure a filter is added to exclude any records with MailingCountry set as 'United Kingdom'.

As you make changes in the SOQL builder, the changes are reflected in the SOQL editor. If you have selected «New Records» or «Changed Records», then an appropriate filter condition is also added automatically to the query.

Note: some Salesforce field data types (e.g. Address and Geolocation) are not supported, so they cannot be selected and appear greyed out in SOQL Builder. For example, in Figure 140, MailingAddress is greyed out for this reason..

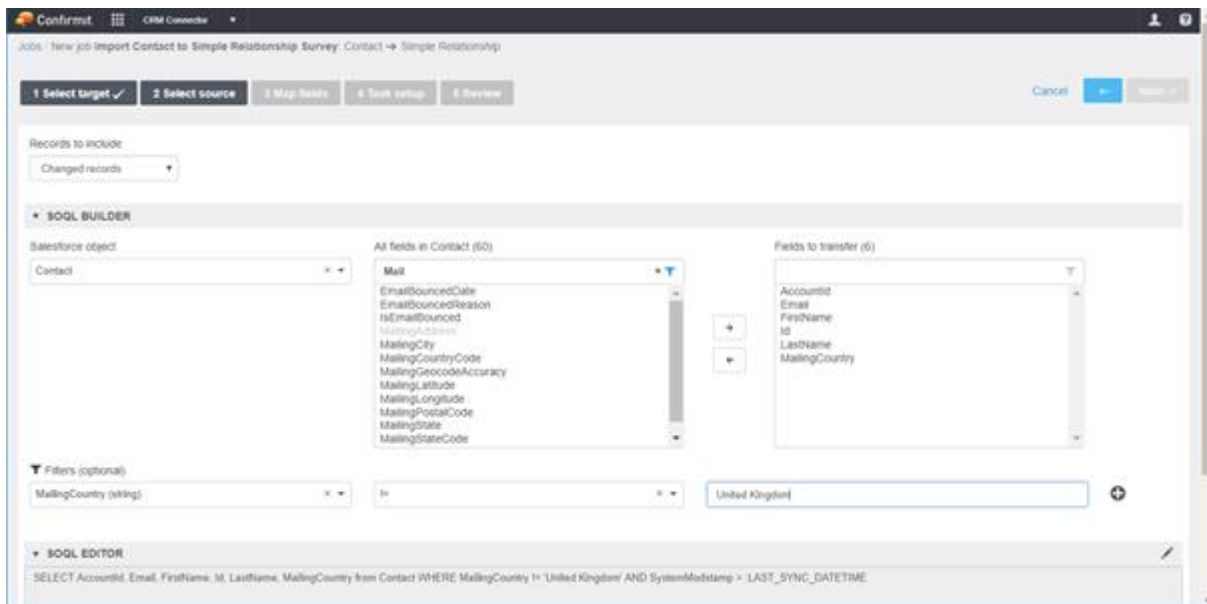


Figure 25 Defining query with SOQL Builder

3. (Optional) Manually edit the query using the SOQL Editor

If you want to change the query created by the SOQL builder, you can update the query using the SOQL editor. To switch to the SOQL editor, click on the **Pencil** icon in the upper right corner of that region on the page. One reason to change the SOQL might be if you want to import data from fields on objects related to the primary object via a Lookup relationship or a Parent relationship. In Figure 132, we have added Account.Name and Account Industry, as examples of references to fields on a related object. In this case, these fields are not on the Contact object, but instead sit on the Account object; the Account object is related to the Contact object via the Account Lookup relationship. So, this is how SOQL approaches multi-object queries.

If you have selected «New Records» or «Changed Records», you still need to use :LAST_SYNC_DATETIME as part of the filter conditions of your query. However, you could change it to use a different filter criteria than the default generated by the SOQL builder.

When the Job is actually submitted, we replace the :LAST_SYNC_DATETIME with the date-time when CRM Connector most recently ran. This makes it much easier for you to setup an integration that only imports records that were recently edited or changed since the last data transfer.

If the query has never run before, then it will be replaced with a date-time at the beginning of the epoch and it will initially include all historical records in the query response.

4. Click the **Test Query** button to submit your query to Salesforce to test it.

You must test the query before proceeding to the next step to map the fields selected in the query. When you test the query, it is submitted to the Salesforce API, and the first 200 records of the query response are displayed so you can check to see that the query behaves as expected. If there is an error in the query or with the Salesforce platform, a message is displayed.

Important

Salesforce SOQL queries can timeout. If your query is too complex or Salesforce has too much load on the system when you submit the query and it cannot be completed, it will fail. This could also happen when running the query in batch mode. If the query is timing out, consider optimizing the table structure in Salesforce or simplifying the query. Work with your Salesforce administrator and Salesforce customer support to resolve this sort of SOQL performance issue.

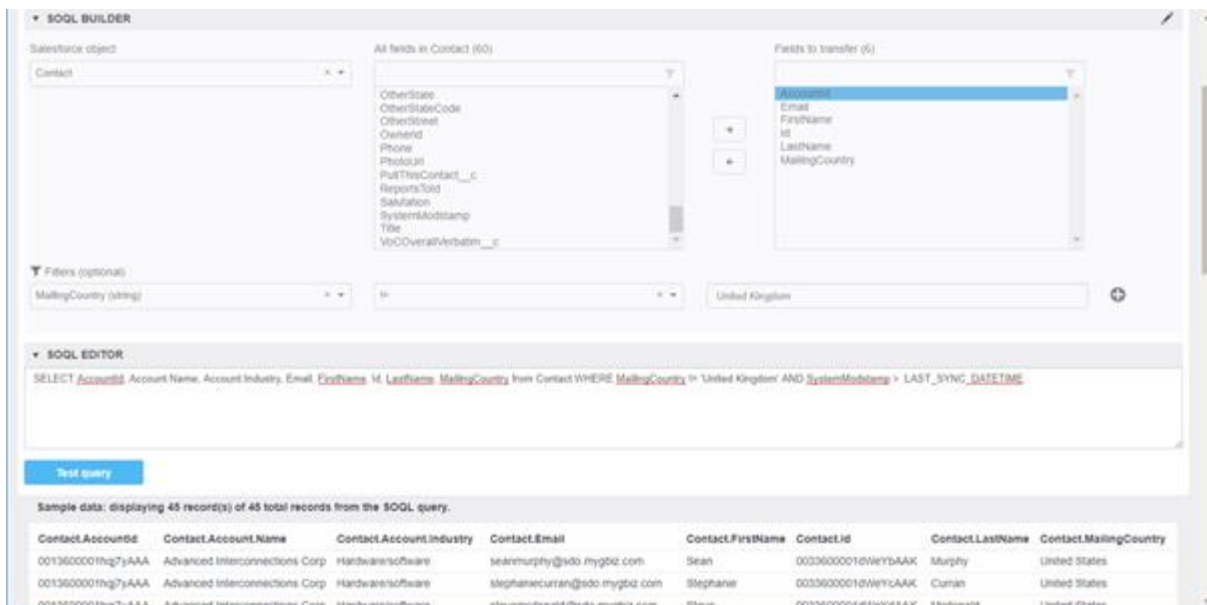


Figure 26 Editing a query with SOQL editor and viewing sample data returned by a query

5. Once you are satisfied with your query, click **Next** to proceed.

Map the selected Salesforce fields to Horizons fields

Now that you have selected the fields for import via the SOQL query, they need to be mapped to fields in the Confirmit respondent table.

1. Select the Import mode from the available choices:
 - **Append** – in this mode, Salesforce data retrieved via the SOQL query will only be added if there is not already a respondent record matching the defined key. For this option a key field must be defined in the mapping.
 - **Merge** – in this mode, Salesforce data retrieved via the SOQL query will be added if there is not already a respondent record matching a defined key. If there is an existing record matching the defined key then the existing record will be updated with the SOQL query results. For this option a key field must be defined in the mapping.

Figure 27 Selecting the import mode

2. Map the Salesforce fields to Confirmit fields.

Choose the desired mapping option for each field from the menu in the Action column.

- o If you choose **Create new**, then you provide a new respondent field name, and the Salesforce field will be mapped to a new respondent field that will be created with that name.

When creating a new field, you have the choice of several custom table data field types: Open text, Numeric, Date, Single. A significant advantage of importing CRM data into custom data tables is that the data will be properly typed.

Salesforce text field types have a maximum size of 4000 characters, and this will always fit into a Confirmit custom data Open text field without truncation.

When writing into a custom data table field of the single (categorical) type, then the data must also be defined as a Salesforce picklist (categorical) variable in Salesforce. Conversion from Salesforce text into a Confirmit single (i.e. auto-coding) is not supported. This ensures that best practices are used and that data is properly categorized at the source inside the CRM prior to importing it into Horizons.

- o If you are creating a new custom data table then you will only have the option to create new fields.
- o If you choose **Link to**, then you select an existing respondent field name and the Salesforce field will be mapped to that existing respondent field.

Salesforce field	Salesforce type	Action	Respondent field	Key field
Contact.AccountID	reference	link to	AccountID	KEY
Contact.AccountName	Text (255)	link to	AccountName	KEY
Contact.AccountIndustry	Picklist	link to	AccountIndustry	KEY
Contact.Email	Email	link to	email	KEY
Contact.FirstName	Text (40)	link to	FirstName	KEY
Contact.LastName	Text (40)	link to	LastName	KEY
Contact.MailingCountry	Text (50)	link to	MailingCountry	KEY

Figure 28 Mapping the fields

3. Select a key

- When importing into custom data tables you must always define a key field for the records. To select a field as the key, click the **Key** button in the row containing the key field. It is important that the key field is unique; if it is not then this process will not work correctly. Duplicates can be created when switching between the import modes, particularly when adding a key definition, so it is recommended that you set this aspect of a job and then do not change it.

Sometimes one key is not enough to make each record unique, and a composite key field is required. For example, a composite key is useful for an annual Voice of the Customer relationship survey. In this case you might only survey the Contact once per year. Salesforce has a unique ContactID, however when you run the survey program over multiple years you also need to survey that Contact over multiple years, so the ContactID cannot be used as the unique key by itself. In this case you could create a composite key of ContactID + Year.

To define a composite key, click on the **Key** button for multiple fields, and they will be combined to form a composite key.

- When you have completed the field mapping, click **Next** to proceed.

Set up the task

Each job creates a data processing task within the Confirmit data processing environment to execute the data transfer.

- Define when the data should be transferred:
 - Off (Sync manually)** - the task will be setup and saved but will not actually run. Use this when you plan to start running the task later.
 - Scheduled** - you may choose to run the job hourly, daily, weekly, monthly, or one time only. Select the date and time when the job is to run.

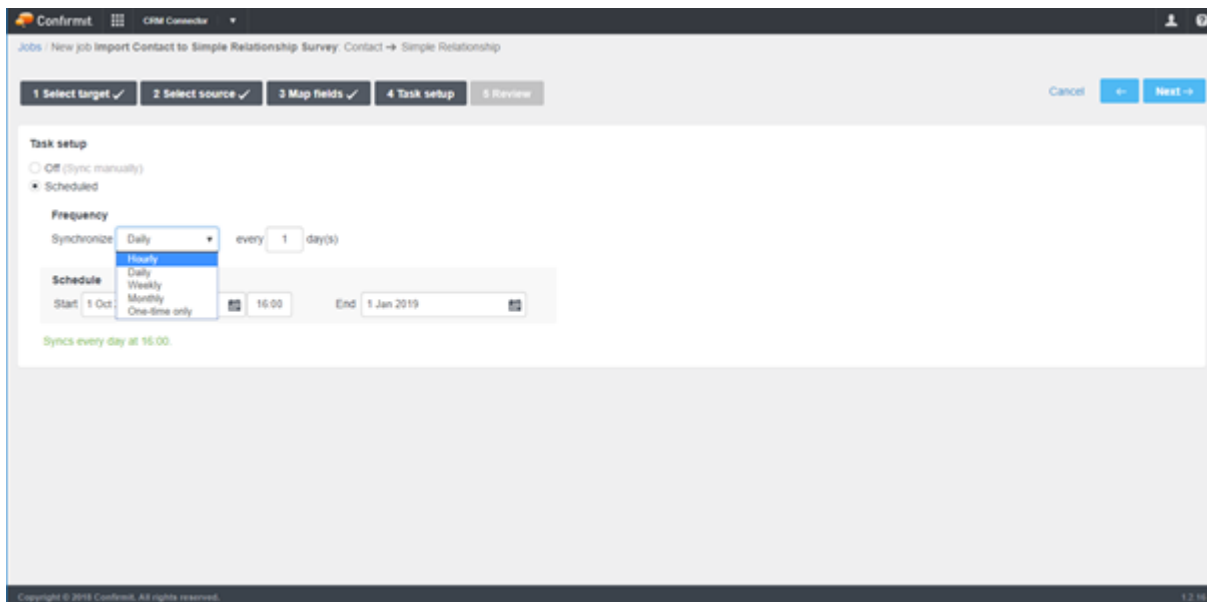


Figure 29 Setting up the task

Review and complete the setup

Before completing the job setup, review the job information. Check that the job will run when expected. Make sure the SOQL query includes all the fields and filtering criteria that you require. Make sure the Salesforce fields are mapped to the expected hub, data set and custom data table, and that the correct key fields are selected. If you need to fix anything you can go back to change it in the wizard before completing the job setup.

- Click **Complete setup** to save your job. You will then be taken to the Job Overview page of your new job.

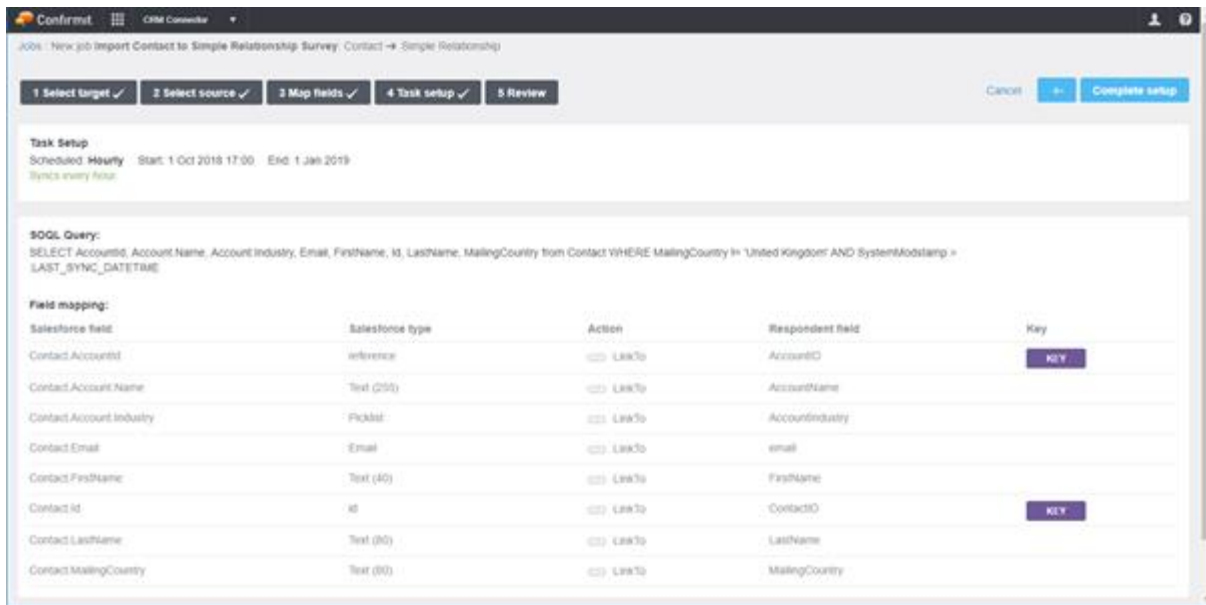


Figure 30 Reviewing the job

1.2.1.3. How to Modify an Existing Job Field Mapping (Salesforce to Confirmit)

After setting up a job, you may decide that you need to change the survey data you wish to transfer.

Note: Although we discuss reconfiguring jobs to import to the respondent table in this section, the workflow is the same when changing jobs to import into custom data tables.

1. To edit an existing job, select **Edit Linking** from the Actions drop-down for that job.

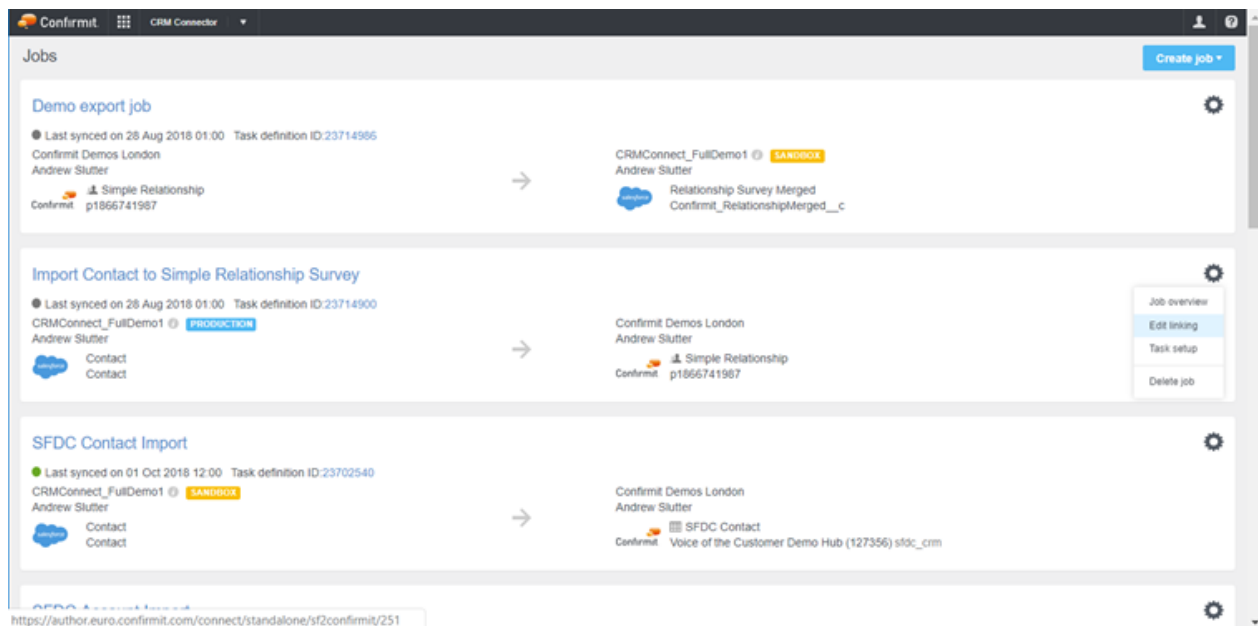


Figure 31 Editing an existing job

2. Make any changes necessary to the transfer job's target inside Confirmit.

You can rename the job or write to a different survey respondent table if desired.

The screenshot shows the Confirmit CRM Connector interface. At the top, there's a header with the Confirmit logo and 'CRM Connector'. Below that, a breadcrumb trail reads 'Jobs / Edit job Import Contact to Simple Relationship Survey (251) / Contact →'. A progress bar indicates five steps: '1 Select target', '2 Select source', '3 Map fields', '4 Task setup', and '5 Review'. The '1 Select target' step is currently active. Below the progress bar, there are two input fields: 'Target type' with a dropdown menu showing 'Respondent table', and 'Job name' with a text input field containing 'Import Contact to Simple Relationship Survey'. Below these fields is a search bar with the placeholder text 'Search'. Under the search bar, there is a list of survey options, each with a radio button and a document icon. The first option, 'Simple Relationship p1066741987', is selected. The other options are 'Fingerprinting reference survey def (v1.2) p1066330448', 'Internal fingerprinting reference integration (v1.2) p1066329686', 'Incentives example survey (2 val) demo login p1065151505', and 'CRM Connector Data Types p1062547979'. At the bottom right of the interface, there are 'Cancel', 'Previous', and 'Next' buttons. The footer contains the text 'Copyright © 2018 Confirmit. All rights reserved.' and the version number '1.2.16'.

Figure 32 Change the job name or target survey respondent table

3. Complete the remaining steps of the wizard (Select source, Map fields, Task Setup, Review).

You have the flexibility to change the SOQL query, the field mapping or the task timing. Be careful if changing the import mode - if you attempt to add or change the key, you might have some duplicate respondents that need to be removed in the respondent editor.

4. After reviewing, save your changes to the job.

When you save the changes, you will be taken to the Job Overview page.

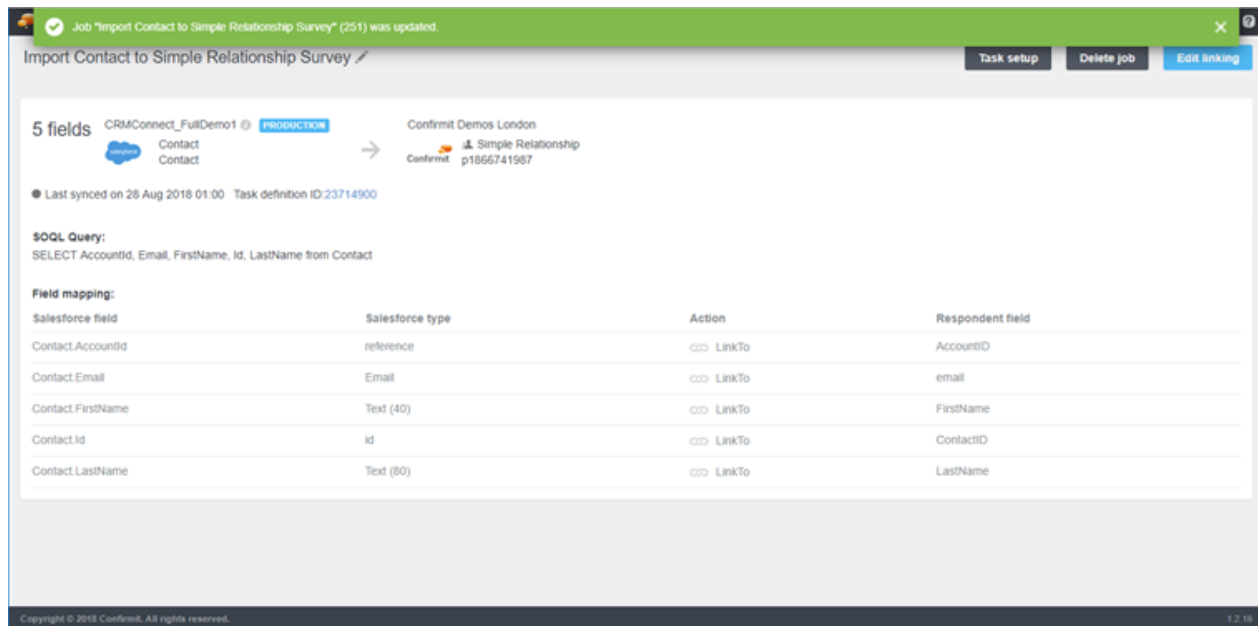


Figure 33 The Job Overview page

1.3. Transferring Data from Confirmit to Salesforce

Note: The CRM Connector for Salesforce is a company add-on and is subject to payment. If your company has not licensed the add-on then the CRM Connector for Salesforce link will not be visible on your home page. Refer to the Confirmit Acceptable Usage Policies (AUP) for further details.

Only Chrome and Firefox browsers are currently supported.

CRM Connector for Salesforce enables you to setup and manage recurring jobs to export data from Confirmit to Salesforce through an easy-to-use wizard. You can choose whether to export completed survey response data or respondent table data. When exporting survey response data, you could for example export NPS score ratings or verbatim text responses into Salesforce. When exporting respondent table data, you could export e-mail delivery status information from survey invitations or export unique respondent-specific survey links. Subsequent Salesforce configuration can make the survey data visible to Salesforce users, or trigger actions to follow-up on interesting survey responses.

This feature is accessible in two versions with nearly identical functionality:

1. Standalone (Horizons) version - this version is accessed via your Horizons platform. This version can be more convenient if you want to switch between multiple Salesforce environments (for example multiple sandboxes and production environments).
2. Salesforce AppExchange version - this version has identical capabilities to the standalone version, but it is accessible from inside Salesforce and distributed via a Salesforce AppExchange App (managed package). This package is an iframe around the standalone version. In this version you cannot switch between Salesforce environments.

Both versions of this feature require two user logins:

1. Confirmit Horizons Professional Authoring login.
2. Salesforce Administrative login.

Note: To use this feature in the interactive mode to setup jobs and create fields and objects in Salesforce, you must have Administrator access privileges for the Salesforce environment. Your Salesforce login must also have the specific Salesforce permissions to: 'modify all data', 'customize application', and 'manage profiles and permission sets'.

Once you have setup the CRM Connector job and it is running in the batch mode you can remove the three Salesforce user privileges and use a less-privileged user, however you will still need to temporarily re-enable them to modify the job in interactive mode.

The Horizons API user included in the CRM Connector for Salesforce package is only for use with the Flex import flow, and not this work flow. The API user cannot be used with this workflow: you must have a normal Confirmit Horizons Professional Authoring user.

Important:

Access to your Salesforce data is governed by Salesforce's Acceptable Usage Policies (AUP). To maintain optimum performance and ensure that the Salesforce API is available to all Salesforce customers, Salesforce imposes daily API usage limits. It is your responsibility to ensure that you do not exceed your Salesforce API usage limits. If you exceed the limits, it could temporarily disable CRM Connector as well as your other Salesforce integrations.

1.3.1. The Procedures

There are three main procedures for this feature:

- Set up a new data transfer job (see How to Set Up a New Data Transfer Job (Confirmit Survey Data to Salesforce) on page 29 for more information).
- Set up a new data transfer job (see How to Set Up a New Data Transfer Job (Confirmit Respondent to Salesforce) on page 38 for more information).
- Modify the field mapping of an existing data transfer job (see How to Modify an Existing Job Field Mapping (Confirmit to Salesforce) on page 46 for more information).

1.3.1.1. How to Set Up a New Data Transfer Job (Confirmit Survey Data to Salesforce)

The procedure for transferring data from the survey table to Salesforce is very similar to transferring data from the respondent table. There are a few differences, though:

- Records only appear in the survey data table after the respondent has begun to take the survey. (They might have completed it or not).
- Survey data includes the actual response information captured by the survey, as well as background variable data or hidden variable data if that is used in your survey.
- Some system fields are accessed in the respondent table, not the survey data table (for example limited survey URLs, or e-mail delivery status).

Creating the job

1. In the **Create Job** menu in the upper-right corner of the Job List, select **Confirmit to Salesforce**.
2. Pick a name for your CRM Connector job. A meaningful label that will help you distinguish between this job and your other CRM Connector jobs.
3. Use the drop-down menu to select Survey data instead of Respondent table as your Confirmit data source. By selecting Survey data, it means you will be transferring the answers your survey takers have provided to your survey questions (for example NPS or other rating questions, open text answers, etc).
4. Select the Confirmit survey you wish to use as the source of the data for the transfer.

This is the survey data which will be sent from Confirmit to Salesforce. You can use the text search to find the survey if you have a large number of survey projects to choose from. Note that the survey must be launched for you to be able to select it.

Once you select the source survey, that survey's name and ID will appear across the top of the wizard underneath the title bar.

The screenshot shows the '1 Select source' step of the 'New job Simple Relationship - Survey Data to SFDC' process. The progress bar at the top indicates the current step. Below the progress bar, the 'Job name' field is populated with 'Simple Relationship - Survey Data to SFDC'. A search bar is present, and a dropdown menu is open, showing 'Survey data' and 'Respondent table' as options. Below the dropdown, a list of survey data sources is displayed, each with a radio button and a document icon. The sources are: 'Fingerprinting reference survey def (v1.2) p1866330448', 'Internal fingerprinting reference integration (v1.2) p1866329606', 'Incentives example survey (2 incentive values) p1865151585', and 'CRM Connector Data Types p1852547070'. The 'CRM Connector Data Types' option is selected. The footer of the interface shows 'Copyright © 2018 Confirmit. All rights reserved.' and the version '1.1.2041'.

Figure 34 Selecting the source

5. Select the Salesforce target object.

This is the object (database table) within Salesforce where the Confirmit survey response data will be written. Data may either be written to an existing custom Confirmit object inside Salesforce, or a new custom Confirmit survey object can be created inside Salesforce. Select the appropriate option.

The screenshot displays the '2 Select target' step of the Confirmit CRM Connector for Salesforce wizard. The top navigation bar includes the Confirmit logo, the title 'CRM Connector for Salesforce', and user information. The main header shows the current job: 'Jobs / New job Simple Relationship - Survey Data to SFDC: Simple Relationship p1866741987'. The progress bar at the top indicates the current step is '2 Select target'. Below this, the 'Select from existing custom Confirmit objects' option is selected, and a list of available objects is shown, with 'Respondent' (API name: Confirmit_Respondent__c) being the selected target.

Figure 35 Selecting the target

If you want to create a new custom Confirmit survey object inside Salesforce, define the information needed to create it:

- o **Label** – The object label that will appear in Salesforce.
- o **Name** – the object's API name (inside Salesforce).
- o **Description** – an object description that will appear inside Salesforce.

Once you select the destination Salesforce object, that object's API name will appear across the top of the wizard under the Confirmit Title Bar.

The screenshot shows the 'Create New Object' step in the Confirmit CRM Connector for Salesforce. The progress bar at the top indicates the current step is '2 Select target'. Below the progress bar, there are two radio buttons: 'Select from existing custom Confirmit objects' (unselected) and 'Create New Object' (selected). A yellow warning box states: 'Please note that creating a new custom object will affect your organization limit in Salesforce'. Below the warning, there are three input fields: 'Label' with the text 'Relationship Survey Data', 'Name' with the text 'Confirmit_RelationshipSurveyData', and 'Description (optional)' which is empty. At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons. The footer contains the copyright notice 'Copyright © 2018 Confirmit. All rights reserved.' and the version number '1.1.2041'.

Figure 36 Creating a new custom object in Salesforce

6. Select the survey question data that you would like to transfer to Salesforce.

To do this, check the boxes next to the questions you wish to export. You could also use the Select All box to select or deselect all questions if you are managing a large number of questions in your survey. The following types of Confirmit questions / variables are supported for export to Salesforce:

- ☐ Single
- ☐ Multi
- ☐ Opentext
- ☐ Numeric
- ☐ Date
- ☐ Grid

If you have an unsupported question type in your source survey, it will appear in the question list but it will be accompanied by a message stating that it cannot be mapped.

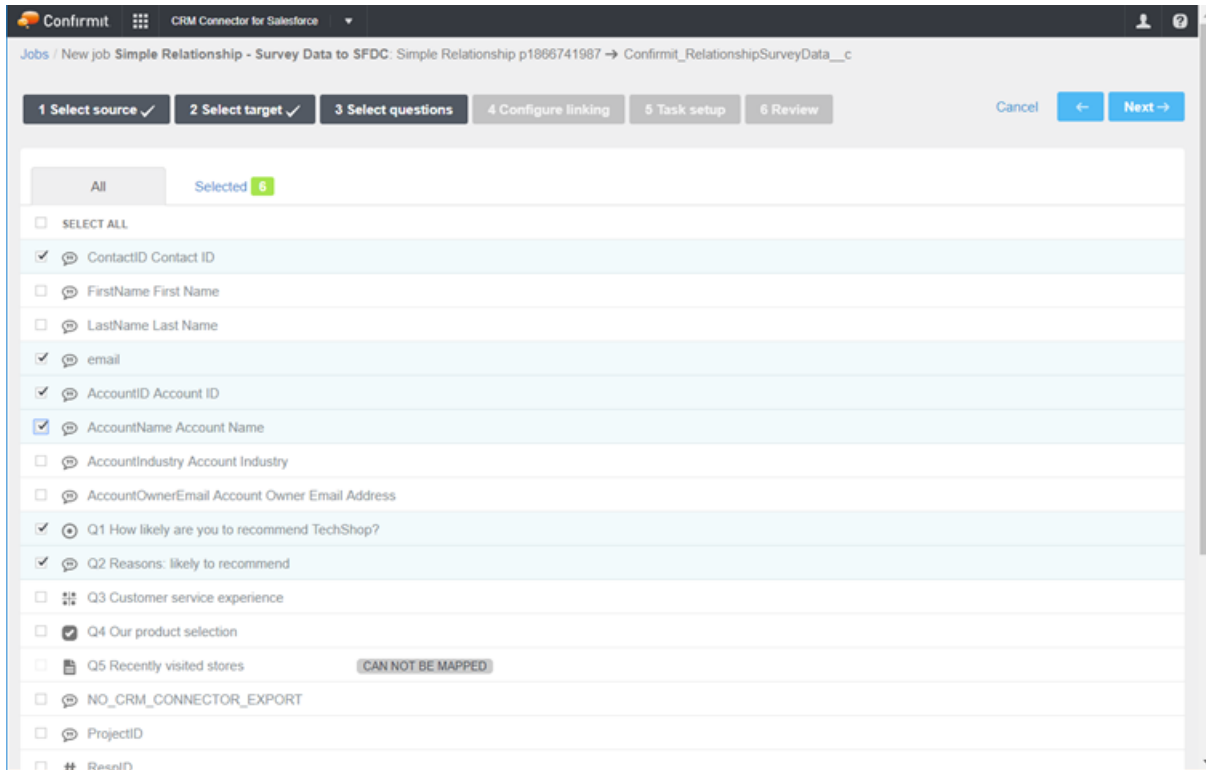


Figure 37 Selecting the questions

Loops are not supported. If your survey contains loops and you are having difficulty setting up a transfer of those questions, you can restructure the survey so that it does not use loops.

Note: For all data transfers, we will always include the Project ID and the Respondent ID. These two variables are concatenated together to form a composite key that uniquely identifies a survey response.

Before proceeding to the next step you can use the “Selected” tab to review which survey questions you have selected to transfer.

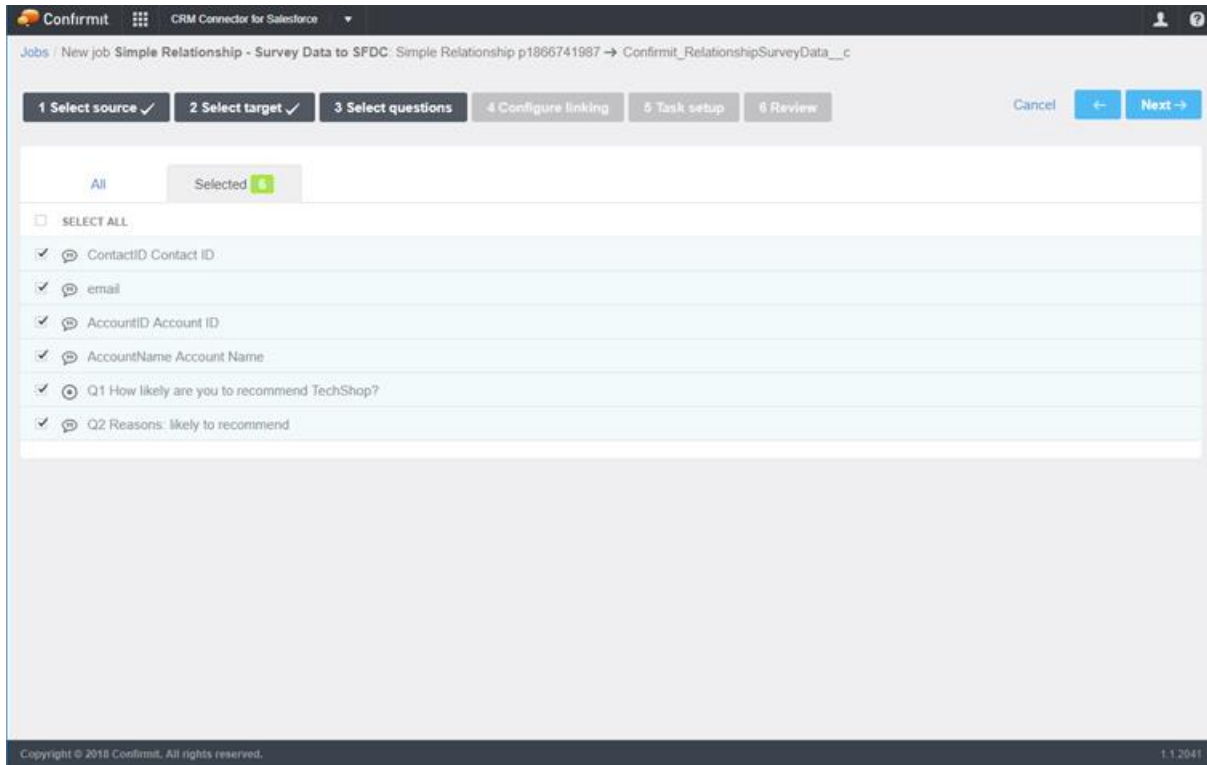


Figure 38 Reviewing your selections

7. (Optional) Filter records from export to Salesforce.

If you created a Text question in your survey called NO_CRM_CONNECTOR_EXPORT (as seen in the figure "Selecting the questions"), then this special question can be used to exclude records from export to Salesforce. If you set the response for this question to '1' (either programmatically via in-survey scripting, or manually via the interactive survey response data editor) then that response will not be transferred to Salesforce. The question can be set as hidden in Survey Designer so that respondents won't see it.

No action is needed to enable the question if it is present. CRM Connector will automatically see it. If any records have been excluded because of NO_CRM_CONNECTOR_EXPORT, then it is noted in the task log (see How to View the History of an Existing Job on page 90 for more information).

8. Select whether you want to transfer answer codes or answer labels.

For single and grid questions, you have the choice of sending either answer codes or answer labels to Salesforce. Inside Salesforce your business users may better understand the text labels, however, numeric codes may be more helpful if you want to do any calculations inside Salesforce with the data. This setting applies to all single and grid questions in the transfer.

Confirmit CRM Connector for Salesforce

Jobs: New job Simple Relationship - Survey Data to SFDC: Simple Relationship p1866741987 → Confirmit_RelationshipSurveyData__c

1 Select source ✓ 2 Select target ✓ 3 Select questions ✓ 4 Configure linking 5 Task setup 6 Review

Cancel ← Next →

Export answer codes for single and grid questions
 Export answer codes for single and grid questions
 Export answer labels for single and grid questions

You can choose to export either answer codes or answer labels (in the default survey language) to Salesforce.

Confirmit field	Action	Salesforce field in Confirmit_RelationshipSurveyData__c object		Salesforce type
ContactID Contact ID	+ create new ▼	API name ContactID	Label Contact ID	Text (30)
email	+ create new ▼	API name email	Label Email	Text (255)
AccountID Account ID	+ create new ▼	API name AccountID	Label Account ID	Text (30)
AccountName Account Name	+ create new ▼	API name AccountName	Label Account Name	Text (255)
Q1 How likely are you to recommend TechShop?	+ create new ▼	API name Q1	Label How likely are you to recommen	Text (50)
Q2 Reasons: likely to recommend	+ create new ▼	API name Q2	Label Reasons: likely to recommend	LongTextArea (4000)
ProjectID + RespondentID	Link to	Confirmit_CompositeKey__c		Text (100) KEY

Figure 39 Selecting answer codes or answer labels

9. Configure the linking between Horizons and Salesforce fields.

Define how to link the Horizons data fields to Salesforce data fields on the custom object.

If the custom object is being created then you can only create new fields on the object. In this case, you can accept the default Salesforce field API names and labels, or name them differently.

If you are writing to an existing custom object, then you have the option of selecting Salesforce fields to be linked to the Horizons field (see How to Modify an Existing Job Field Mapping (Confirmit to Salesforce) on page 46 for more information).

Confirmit field	Action	API name	Label	Salesforce type
ContactID Contact ID	+ create new	ContactID	Contact ID	Text (30)
email	+ create new	email	Email	Text (255)
AccountID Account ID	+ create new	AccountID	Account ID	Text (30)
AccountName Account Name	+ create new	AccountName	Account Name	Text (255)
Q1 How likely are you to recommend TechShop?	+ create new	Q1	How likely are you to recommen	Text (50)
Q2 Reasons: likely to recommend	+ create new	Q2	Reasons: likely to recommend	LongTextArea (4000)
ProjectID * RespondentID	Link to	Confirmit_CompositeKey__c		Text (100) KEY

Figure 40 Configuring the linking

Setting up the task

Each job creates a data processing task within the Confirmit environment to execute the data transfer.

1. Define when the data should transfer:
 - o Off (Sync manually) - the task will be setup and saved but will not actually run. Use this when you plan to start running the task later.
 - o Scheduled - you may choose to run the job hourly, daily, weekly, monthly, or one time only. Select the data and time when the job is to run.
2. Define the survey response data filter options:
 - o Data to be included - for recurring data transfers you will normally only want to transfer new and changed records. However, in some cases you will want to transfer all survey data, so that is a choice.
 - o Interview status filter - decide whether to include only completed surveys ('Completed'), or to include all surveys ('All') which will transfer data for surveys that, for example were started and some questions were answered, but the survey has not been completely answered.
3. Advanced Settings
 - o These settings can typically be left unchanged, however they are discussed in this guide (see How to Modify an Existing Job Field Mapping (Confirmit to Salesforce) on page 46 for more information).

Confirmit CRM Connector for Salesforce

Jobs / New job Simple Relationship - Survey Data to SFDC: Simple Relationship p1866741987 → Confirmit_RelationshipSurveyData__c

1 Select source ✓ 2 Select target ✓ 3 Select questions ✓ 4 Configure linking ✓ 5 Task setup 6 Review

Cancel ← Next →

Task setup

☐ Off (Sync manually)

☒ Scheduled

Frequency

Synchronize Hourly every 1 hour(s)

Schedule

Start 9 Jul 2018 16:00 End 9 Oct 2018

Syncs every hour.

Data to be included

☐ All

☒ New and changed records

Interview status filter

☐ All

☒ Completed

▶ ADVANCED SETTINGS

Figure 41 Setting up the task

Reviewing and completing the setup

Before saving the job, review the job information. Check that the job will run when expected, review the selected questions, the associated action, and which fields will be created in Salesforce. Note that for some compound question types, multiple Salesforce fields will be created.

Click **Complete setup** to save your changes.

Confirmit field	Action	Salesforce API name	Salesforce type
ContactID	Create new	ContactID__c	Text (30)
email	Create new	email__c	Text (255)
AccountID	Create new	AccountID__c	Text (30)
AccountName	Create new	AccountName__c	Text (255)
Q1	Create new	Q1__c	Text (250)
Q2	Create new	Q2__c	LongTextArea (4000)
ProjectID + RespondentID	Link to	Confirmit_CompositeKey__c	Text (100) KEY

Figure 42 Completing the setup

1.3.1.2. How to Set Up a New Data Transfer Job (Confirmit Respondent to Salesforce)

The procedure for transferring data from the respondent table to Salesforce is very similar to transferring data from the survey response table. There are a few differences though:

- The respondent table is a list of possible survey respondents. There is no guarantee they have taken the survey, or even been invited to take the survey.
- There are no compound question types in the respondent table, just single data fields.
- The respondent table contains a range of useful system fields associated with each respondent, such as the status of attempted e-mail deliveries, and the specific survey URL associated with that respondent. In some integration scenarios it is useful to transfer this data into Salesforce to centrally manage user engagement and/or use a bulk e-mail delivery tool integrated with Salesforce (for example Marketing Cloud).

Creating the job

1. In the **Create Job** menu in the upper-right corner of the Job List, select **Confirmit to Salesforce**.
2. Pick a name for your CRM Connector job. A meaningful label that will help you distinguish between this job and your other CRM Connector jobs.
3. Use the drop-down menu to select Respondent table instead of Survey data as your Confirmit data source. By selecting Respondent table, it means you will be transferring information about the potential survey respondents and the associated system information. You will not be transferring actual captured survey response data.
4. Select the particular Confirmit survey you wish to use as the source of the data for the transfer.

This is the survey data which will be sent from Confirmit to Salesforce. You can use the text search to find the survey if you have a large number of survey projects to choose from. Note that the survey must be launched for you to be able to select it.

Once you select the source survey, that survey's name and ID will appear across the top of the wizard underneath the title bar.

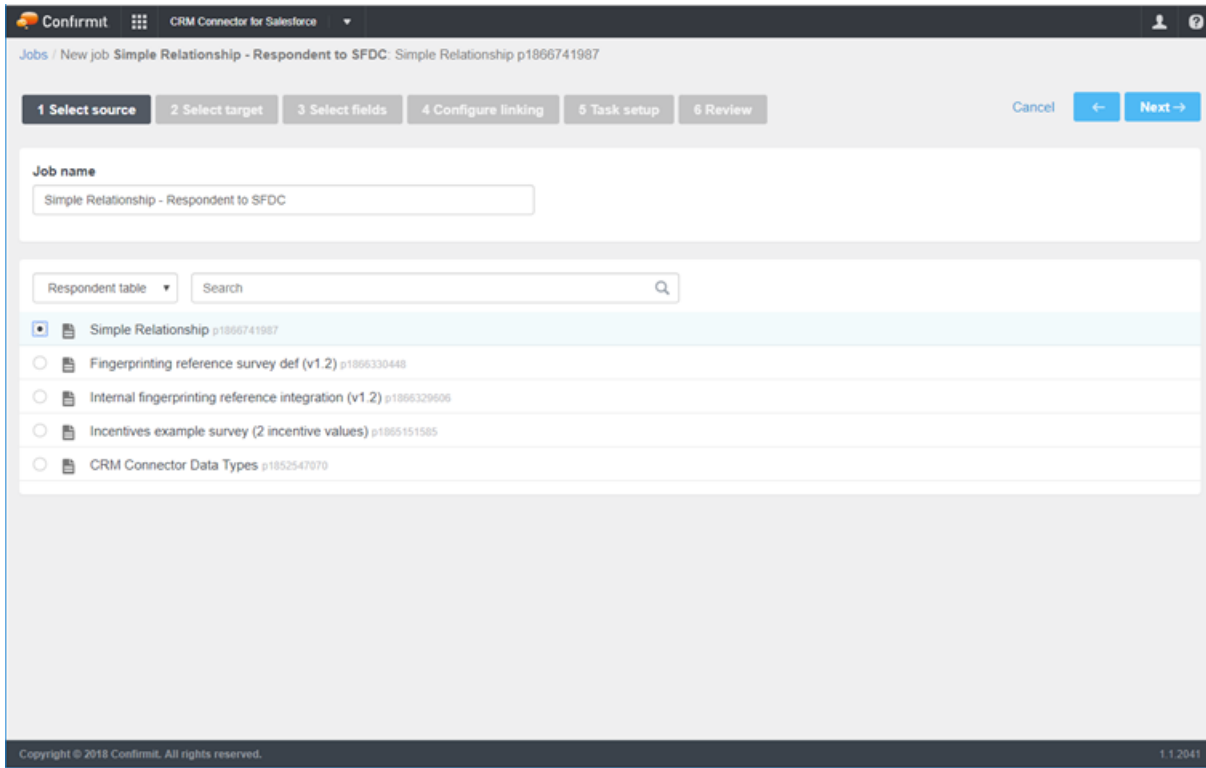


Figure 43 Selecting the source

5. Select the Salesforce target object.

This is the object within Salesforce where the Confirmit survey response data will be written. Data may either be written to an existing custom Confirmit object inside Salesforce, or a new custom Confirmit survey object can be created inside Salesforce. Select the appropriate option.

The screenshot shows the 'Select target' step of a wizard. At the top, a progress bar indicates the current step is '2 Select target', with previous steps '1 Select source' and '3 Select fields' completed, and subsequent steps '4 Configure linking', '5 Task setup', and '6 Review' pending. To the right of the progress bar are 'Cancel', 'Previous' (left arrow), and 'Next' (right arrow) buttons. The main content area has two radio buttons: 'Select from existing custom Confirmit objects' (which is selected) and 'Create New Object'. Below these, a list displays a single option: 'Relationship Survey Data' with its corresponding API name '(Confirmit_RelationshipSurveyData__c)'.

Figure 44 *Selecting the target*

If you want to create a new custom Confirmit survey object inside Salesforce, define the information needed to create it:

- o **Label** – The object label that will appear in Salesforce.
- o **Name** – the object's API name (inside Salesforce).
- o **Description** – an object description that will appear inside Salesforce.

Once you select the destination Salesforce object, that object's API name will appear across the top of the wizard under the Confirmit Title Bar.

The screenshot shows the Confirmit CRM Connector for Salesforce interface. At the top, there's a header with the Confirmit logo and 'CRM Connector for Salesforce'. Below that, a breadcrumb trail reads 'Jobs / New job Simple Relationship - Respondent to SFDC: Simple Relationship p1866741987 → Confirmit_Respondent__c'. A progress bar at the top contains six steps: '1 Select source ✓', '2 Select target', '3 Select fields', '4 Configure linking', '5 Task setup', and '6 Review'. To the right of the progress bar are 'Cancel', '←', and 'Next →' buttons. The main content area has two radio buttons: 'Select from existing custom Confirmit objects' (unselected) and 'Create New Object' (selected). Below these is a yellow warning box with an information icon and the text: 'Please note that creating a new custom object will affect your organization limit in Salesforce'. Under the warning, there are three input fields: 'Label' with the text 'Relationship Survey Respondent', 'Name' with the text 'Confirmit_ Respondent', and 'Description (optional)' which is empty. At the bottom left, a copyright notice reads 'Copyright © 2018 Confirmit. All rights reserved.' and at the bottom right, the version number '1.1.2041' is displayed.

Figure 45 *Creating a new custom object in Salesforce*

6. Select the response table data that you would like to transfer to Salesforce.

To do this, check the boxes next to the questions you wish to export. You could also use the Select All box to select or deselect all questions if you are managing a large number of questions in your survey.

If you have created custom variables here from importing data (for example via manual upload, SFTP upload, or by importing data from Salesforce using CRM Connector for Salesforce) you will see those fields listed here, and you have the option to transfer that data to Salesforce. One import reason to include these fields is if they are Salesforce reference IDs. In that scenario, these fields can be useful to link the respondent record back to other objects within Salesforce.

The screenshot shows the 'Select fields' step in the Confirmit CRM Connector interface. The progress bar at the top indicates the current step is '3 Select fields'. The 'Selected' count is 6. The following table lists the fields available for selection:

Field Name	Description	Selected
AccountID		☒
AccountIndustry		☐
AccountName		☐
AccountOwnerEmail		☐
CapiInterviewerId	CAPI Interviewer ID	☐
ContactID		☒
CreatedDate	Time when the respondent record was created	☐
email		☒
FailedLoginAttempts	Respondent's number of failed login attempts	☐
FilteredBySurveyId	Survey ID containing the e-mail invitation causing this respondent e-mail to be blocked (part of Contact Frequency Rules)	☐
FilterStatus	If '1' then this respondent's e-mail address is blocked by Contact Frequency Rules	☐
FilterStatusDate	Time when the respondent's e-mail address was blocked by Contact Frequency Rules	☐
FirstEmailedDate	Time when the respondent was first sent an e-mail	☒
FirstName		☐
LastName		☐
LastUpdated	Time when the respondent record was last updated	☐

Figure 46 Selecting the fields

System fields have a description to the right to make their meaning clearer. The system fields are used by a variety of different parts of the Confirmit platform: the e-mailing module, the e-mail opt-out feature, the CATI module, Contact frequency rule manager, etc.

Note: For all data transfers, we will always include the Project ID and the Respondent ID. These two variables are concatenated together to form a composite key that uniquely identifies a survey response.

Before proceeding to the next step you can use the "Selected" tab to review which survey questions you have selected to transfer.

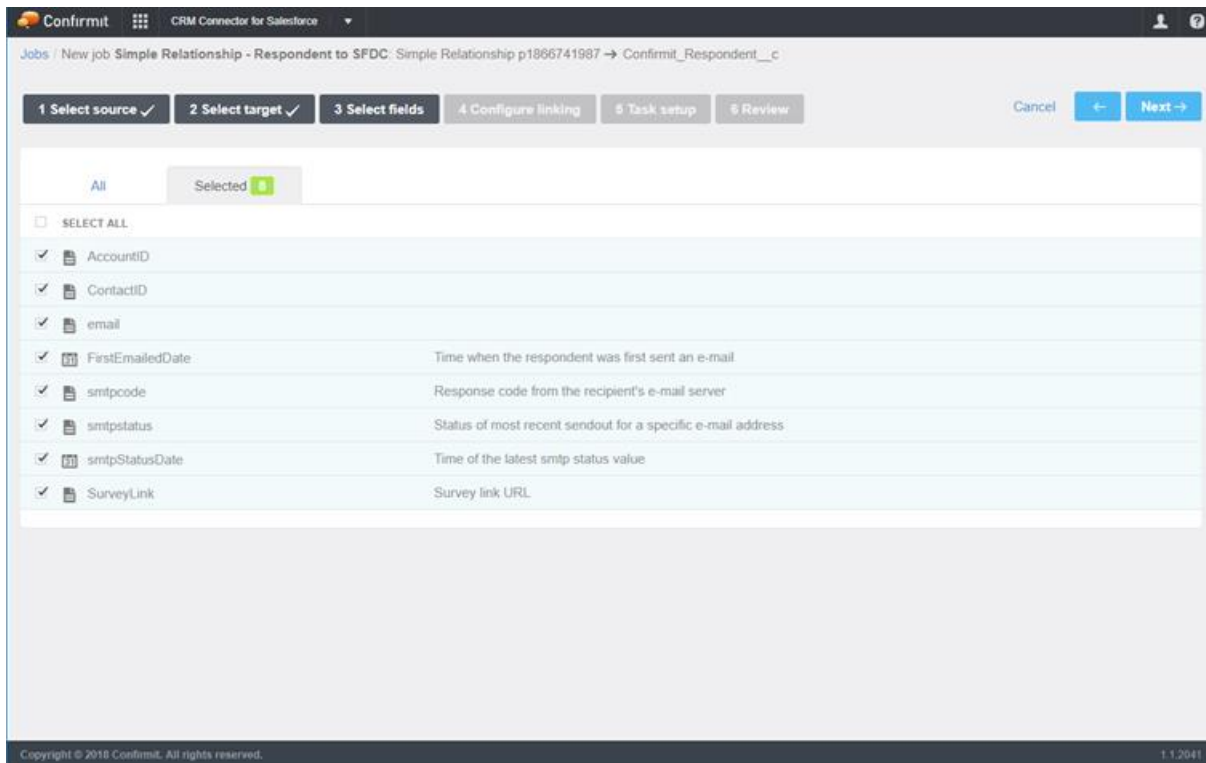


Figure 47 Reviewing your selections

7. (Optional) Filter records from export to Salesforce.

If you created a field in the respondent table called NO_CRM_CONNECTOR_EXPORT (as seen in the figure «Selecting the questions»), then this special field can be used to exclude records from export to Salesforce. If you set the response for this question to '1' then that respondent record will not be exported.

8. Configure the linking between Horizons and Salesforce fields.

Define how to link the Horizons data fields to Salesforce data fields on the custom object.

If the custom object is being created then you can only create new fields on the object. In this case, you can accept the default Salesforce field API names and labels, or name them differently.

If you are writing to an existing custom object, then you have the option of selecting Salesforce fields to be linked to the Horizons field (see How to Modify an Existing Job Field Mapping (Confirmit to Salesforce) on page 46 for more information).

Confirmit field	Action	Salesforce field in Confirmit_Respondent__c object		Salesforce type
		API name	Label	
AccountID	+ create new ▼	AccountID	Account ID	Text (30)
ContactID	+ create new ▼	ContactID	Contact ID	Text (30)
email	+ create new ▼	email	Email	Text (255)
FirstEmailedDate	+ create new ▼	FirstEmailedDate	Survey First Invitation	Date Time
smtpcode	+ create new ▼	smtpcode	Survey SMTP Code	Text (12)
smtpstatus	+ create new ▼	smtpstatus	Survey SMTP Status	Text (32)
smtpStatusDate	+ create new ▼	smtpStatusDate	Survey SMTP Status Date	Date Time
SurveyLink	+ create new ▼	SurveyLink	Survey Link	LongTextArea (4000)
ProjectID * RespondentID	Link to	Confirmit_CompositeKey__c		Text (100) KEY

Figure 48 Configuring the linking

Setting up the task

Each job creates a data processing task within the Confirmit environment to execute the data transfer.

1. Define when the data should transfer:
 - o Off (Sync manually) - the task will be setup and saved but will not actually run. Use this when you plan to start running the task later.
 - o Scheduled - you may choose to run the job hourly, daily, weekly, monthly, or one time only. Select the data and time when the job is to run.
2. Define the respondent data filter options:
 - o Data to be included - for recurring data transfers you will normally only want to transfer new and changed records. However, in some cases you will want to transfer all survey data, so that is a choice.
 - o Interview status filter - decide whether to include only completed surveys ('Completed'), or to include all surveys ('All') which will transfer data for surveys that, for example were started and some questions were answered, but the survey has not been completely answered.
3. Advanced Settings
 - o These settings can typically be left unchanged, however they are discussed in this guide (see How to Modify an Existing Job Field Mapping (Confirmit to Salesforce) on page 46 for more information).

The screenshot shows the 'Task setup' step in the Confirmit CRM Connector interface. At the top, a progress bar indicates the following steps: 1 Select source ✓, 2 Select target ✓, 3 Select fields ✓, 4 Configure linking ✓, 5 Task setup (current step), and 6 Review. Navigation buttons include 'Cancel', a back arrow, and a 'Next ->' button.

Task setup

☐ Off (Sync manually)
☒ Scheduled

Frequency

Synchronize: Hourly every 1 hour(s)

Schedule

Start: 9 Jul 2 17:00 End: 9 Oct 2018

Syncs every hour.

Data to be included

☐ All
☒ New and changed records

▶ ADVANCED SETTINGS

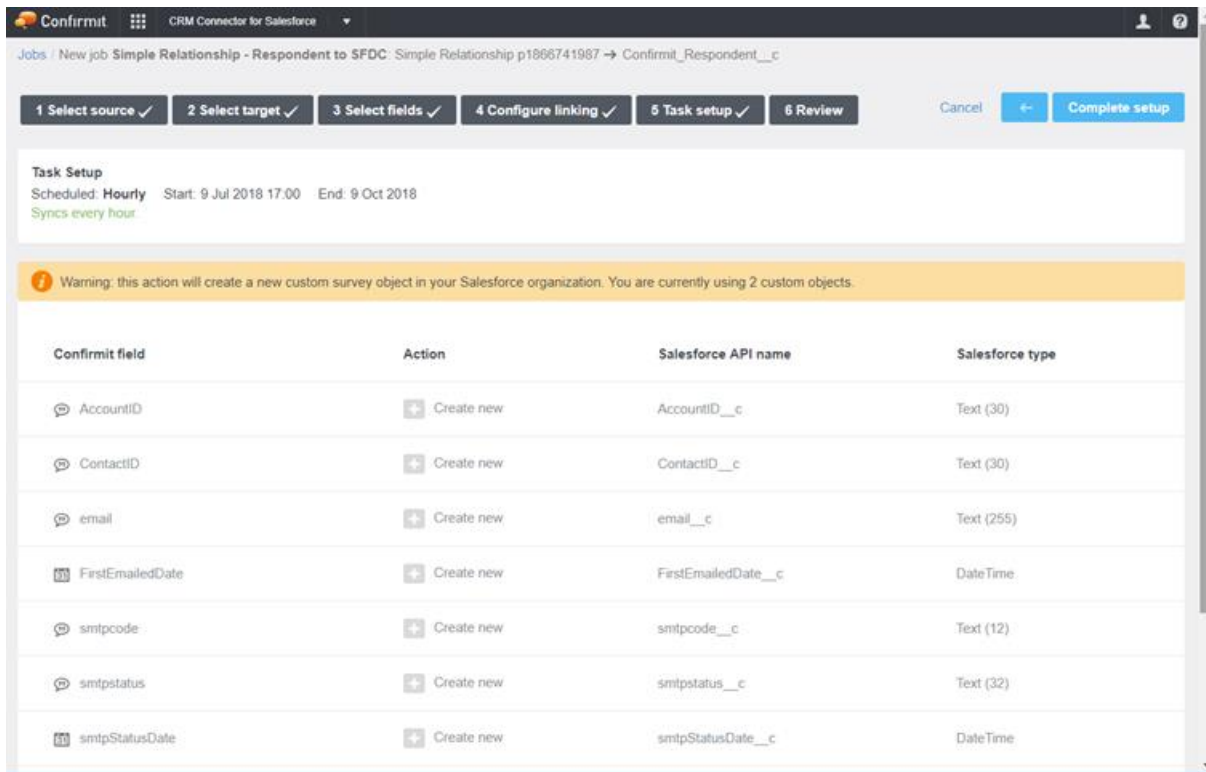
Copyright © 2018 Confirmit. All rights reserved. 1.1.2041

Figure 49 Setting up the task

Reviewing and completing the setup

Before saving the job, review the job information. Check that the job will run when expected, review the selected fields, the associated action, and which fields will be created in Salesforce.

Click **Complete setup** to save your changes.



Confirmit CRM Connector for Salesforce

Jobs: New job Simple Relationship - Respondent to SFDC: Simple Relationship p1866741987 → Confirmit_Respondent__c

1 Select source ✓ 2 Select target ✓ 3 Select fields ✓ 4 Configure linking ✓ 5 Task setup ✓ 6 Review

Cancel Complete setup

Task Setup
 Scheduled: **Hourly** Start: 9 Jul 2018 17:00 End: 9 Oct 2018
 Syncs every hour

Warning: this action will create a new custom survey object in your Salesforce organization. You are currently using 2 custom objects.

Confirmit field	Action	Salesforce API name	Salesforce type
AccountID	Create new	AccountID__c	Text (30)
ContactID	Create new	ContactID__c	Text (30)
email	Create new	email__c	Text (255)
FirstEmailedDate	Create new	FirstEmailedDate__c	DateTime
smtpcode	Create new	smtpcode__c	Text (12)
smtpstatus	Create new	smtpstatus__c	Text (32)
smtpStatusDate	Create new	smtpStatusDate__c	DateTime

Figure 50 Completing the setup

1.3.1.3. How to Modify an Existing Job Field Mapping (Confirmit to Salesforce)

After setting up a transfer job, you may decide that you need to change the selected questions or field linking. The procedure is largely the same regardless of whether you are transferring data into Salesforce from the respondent table or from the survey response table. Because the two workflows are so similar we will illustrate the procedure using the feature to export from survey response data as the example, but the process is the same if you are modifying a job to export respondent table data.

1. To edit an existing job, select **Edit Linking** from the Actions drop-down for that job.

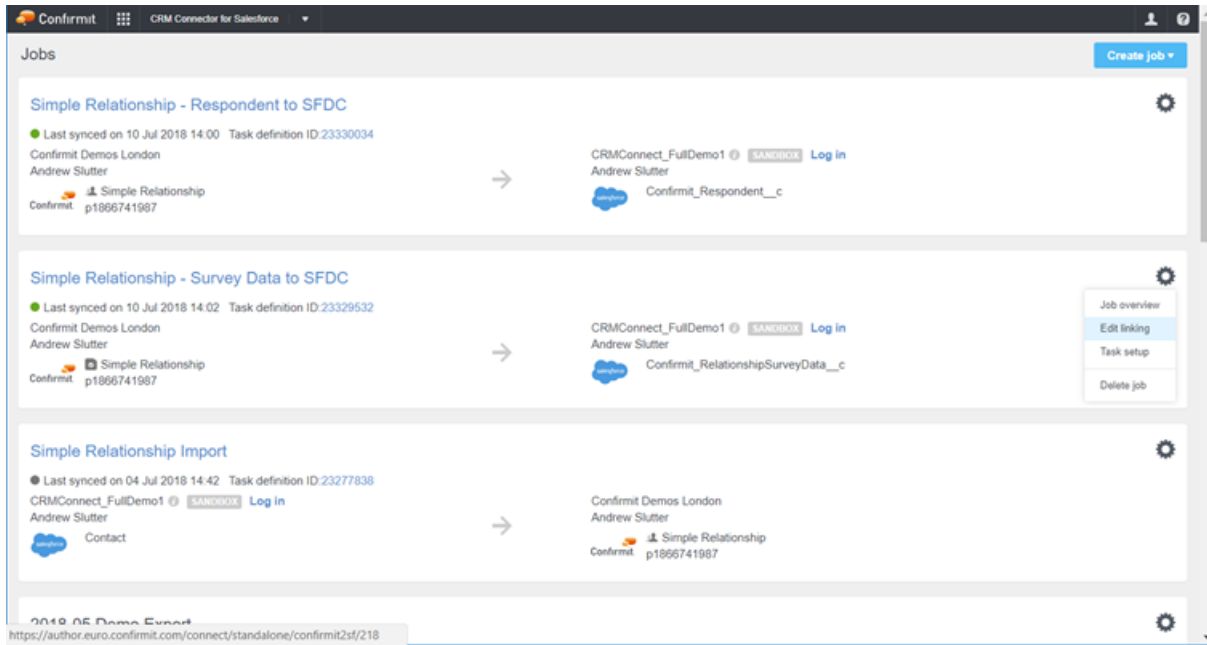


Figure 51 Editing an existing job

2. Make any changes necessary to the question / field mapping.

Select and deselect the checkboxes next to the Confirmit survey questions / respondent fields to add or remove them from the data transfer job. Questions / fields that are currently mapped will already be checked.

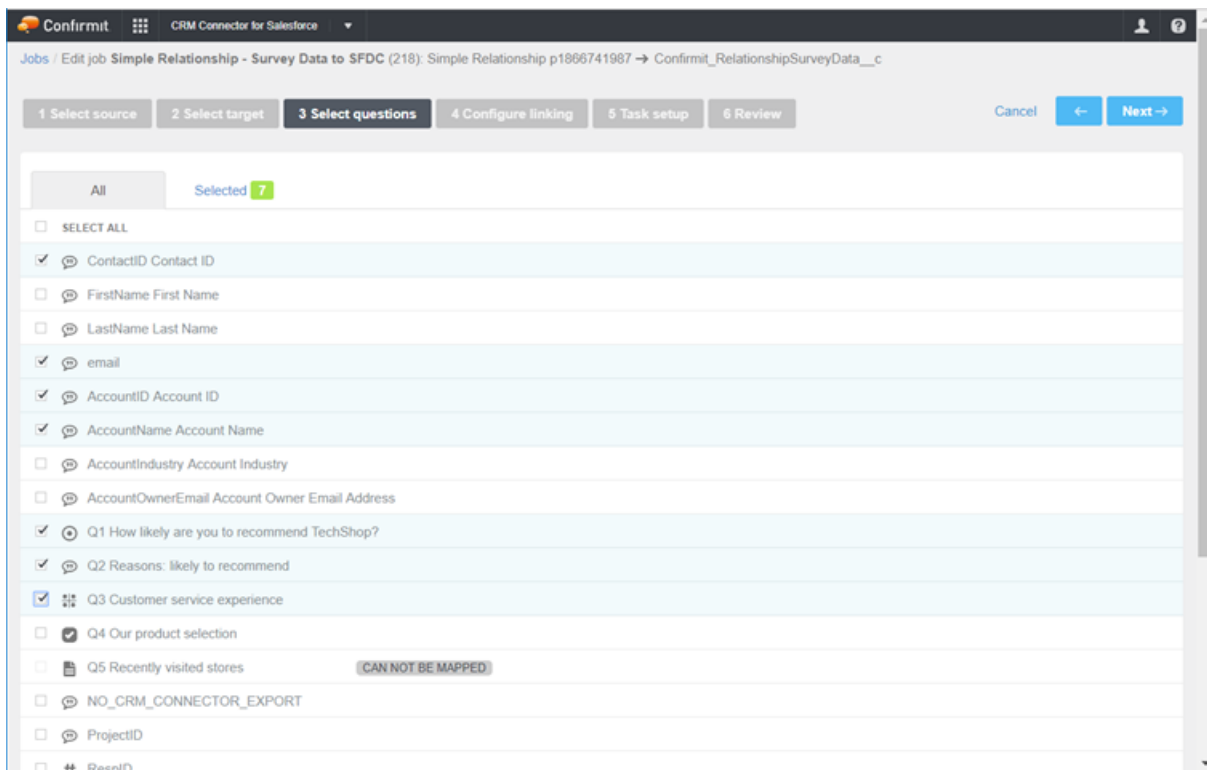


Figure 52 Editing the question mapping

3. Update the field linking

Make any required changes to the field linking and/or create new fields on the Salesforce custom object.

One particularly useful reason to change the linking is so that you can write Salesforce reference IDs from the Confirmit Horizons record directly into a Salesforce reference field (for example a Lookup or Master-Detail relationship). Reference fields can be used inside Salesforce to link a survey response or respondent record directly to a related Salesforce object record (for example a specific Contact, an Account, or a Case associated with the survey response or respondent record). CRM Connector for Salesforce cannot create reference fields; they should be created inside Salesforce. However, the wizard can link to an existing reference field, as shown in the figure below.

IMPORTANT

The menu of available Salesforce fields for linking will only show valid field linkings. Fields whose Salesforce data type cannot be linked to a Horizons data type will be visible but grayed out in the menu. Salesforce fields that cannot be updated through the Salesforce API will not appear in the menu list at all. Note that when creating a Master-Detail relationship inside Salesforce, you must set the option to Allow re-parenting if you want to use it here. Without that setting, you cannot update the relationship and so CRM Connector will not list that choice.

Confirmit field	Action	Salesforce field in Confirmit_RelationshipSurveyData__c object	Salesforce type
ContactID Contact ID	link to	API name (Salesforce label) ContactMaster__c (Contact)	reference
email	link to	API name (Salesforce label) AccountID__c (Account ID) AccountName__c (Account Name) ContactID__c (Contact ID) ContactMaster__c (Contact) email__c (Email) Q1__c (How likely are you to recommend TechS...) Q2__c (Reasons: likely to recommend)	Text (255)
AccountID Account ID	link to	API name (Salesforce label) AccountName__c (Account Name)	Text (255)
AccountName Account Name	link to	API name (Salesforce label) Q1__c (How likely are you to recommend TechS...)	Text (250)
Q1 How likely are you to recommend TechShop?	link to	API name (Salesforce label) Q2__c (Reasons: likely to recommend)	LongTextArea (4000)
Q2 Reasons: likely to recommend	link to	API name (Salesforce label) Q3__c (Customer service experience (3 fields))	Text (250)
Q3 Customer service experience (3 fields)	create new	API name Q3__c Label ... our staff is friendly and courteous	Text (250)

Figure 53 Configuring the linking (linking to Lookup relationships)

4. Make any changes as needed to the Task setup

(Optional) Advanced Settings.

You can control the Salesforce bulk upload batch size here. This is a debugging feature. CRM Connector for Salesforce exports survey response data or respondent data into Salesforce in batches of 5000 records. Often when setting up an integration, Salesforce has been configured by the administrator to automatically process the Confirmit data records after a CRM Connector upload (for example with a Process Builder workflow or an APEX handler). However, if that Salesforce process fails because of invalid data stored in Confirmit, Salesforce may reject an entire group of survey records. This feature is helpful in that scenario because you can temporarily set the batch size to 1 and load the records into Salesforce one at a time to more easily see which specific records have the data problem. It is best practice to leave this at the normal default setting to make sure you won't exceed your daily global Salesforce API call limits.

Jobs / Edit job Simple Relationship - Survey Data to SFDC (218): Simple Relationship p1866741987 → Confirmit_RelationshipSurveyData__c

1 Select source 2 Select target 3 Select questions ✓ 4 Configure linking ✓ 5 Task setup 6 Review

Cancel ← Next →

Task setup

☐ Off (Sync manually)
☒ Scheduled

Frequency

Synchronize: Hourly every 1 hour(s)

Schedule

Start: 9 Jul 2018 17:00 End: 9 Oct 2018

Syncs every hour.

Data to be included

☐ All
☒ New and changed records

Interview status filter

☐ All
☒ Completed

ADVANCED SETTINGS

Salesforce bulk upload batch size

5000

Figure 54 Advanced Settings for Task setup

- Review and accept the changes to your job.
 When you save the changes, you will be taken to the Job Overview page.

Job "Simple Relationship - Survey Data to SFDC" (218) was updated

Simple Relationship - Survey Data to SFDC

Task setup Delete job Edit linking

10 fields Confirmit Demos London CRMConnect_FullDemo1 **SAMPLEXIDE**

Simple Relationship Relationship Survey Data
p1866741987 Confirmit_RelationshipSurveyData__c

Last synced on 09 Jul 2018 16:01 Task definition ID:23329532

Confirmit field	Action	Salesforce API name	Salesforce type
ContactID	Link to	ContactMaster__c	reference
email	Link to	email__c	Text (255)
AccountID	Link to	AccountID__c	Text (30)
AccountName	Link to	AccountName__c	Text (255)
Q1	Link to	Q1__c	Text (250)
Q2	Link to	Q2__c	LongTextArea (4000)
Q3 Customer service experience			
Q3_1	Link to	Q3_1__c	Text (250)
Q3_2	Link to	Q3_2__c	Text (250)

Figure 55 The Job Overview page

2. CRM Connector for Microsoft Dynamics

The CRM Connector for Microsoft Dynamics allows you to transfer data from Microsoft Dynamics into Confirmit. This chapter describes the functionality and procedures.

Important

CRM Connector for Microsoft Dynamics works with Microsoft Dynamics-365, the cloud version of the platform. It does NOT support the on-premise version of Microsoft Dynamics. If you have any questions or you need assistance regarding the CRM Connector for Microsoft Dynamics functionality, contact your Confirmit supplier or send an email to support@confirmit.com. Microsoft or their reseller will not be able to assist you with the Confirmit application.

2.1. Accessing CRM Connector for MS Dynamics

To access CRM Connector, the feature must first be enabled in Confirmit, then a wizard will be accessible to guide you through the setup process.

2.1.1. Enabling the Feature in Confirmit

Contact your account manager to enable the feature for your company.

2.1.2. Accessing the Wizard

From Survey Designer (or another module), select **CRM Connector** from the global navigation menu. Note that the option will only appear if the feature is enabled for your company.

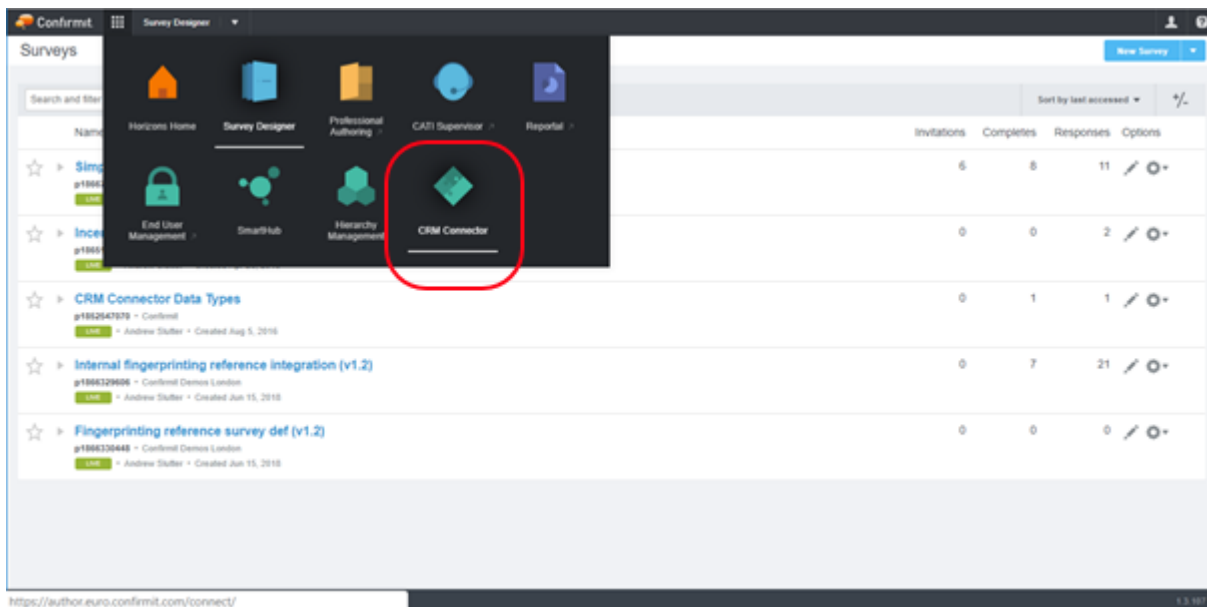


Figure 56 The CRM Connector link in Survey Designer

Alternatively, from the Horizons home page, click on the **CRM Connector** tile. Again, the option will only appear if the feature is enabled for your company.

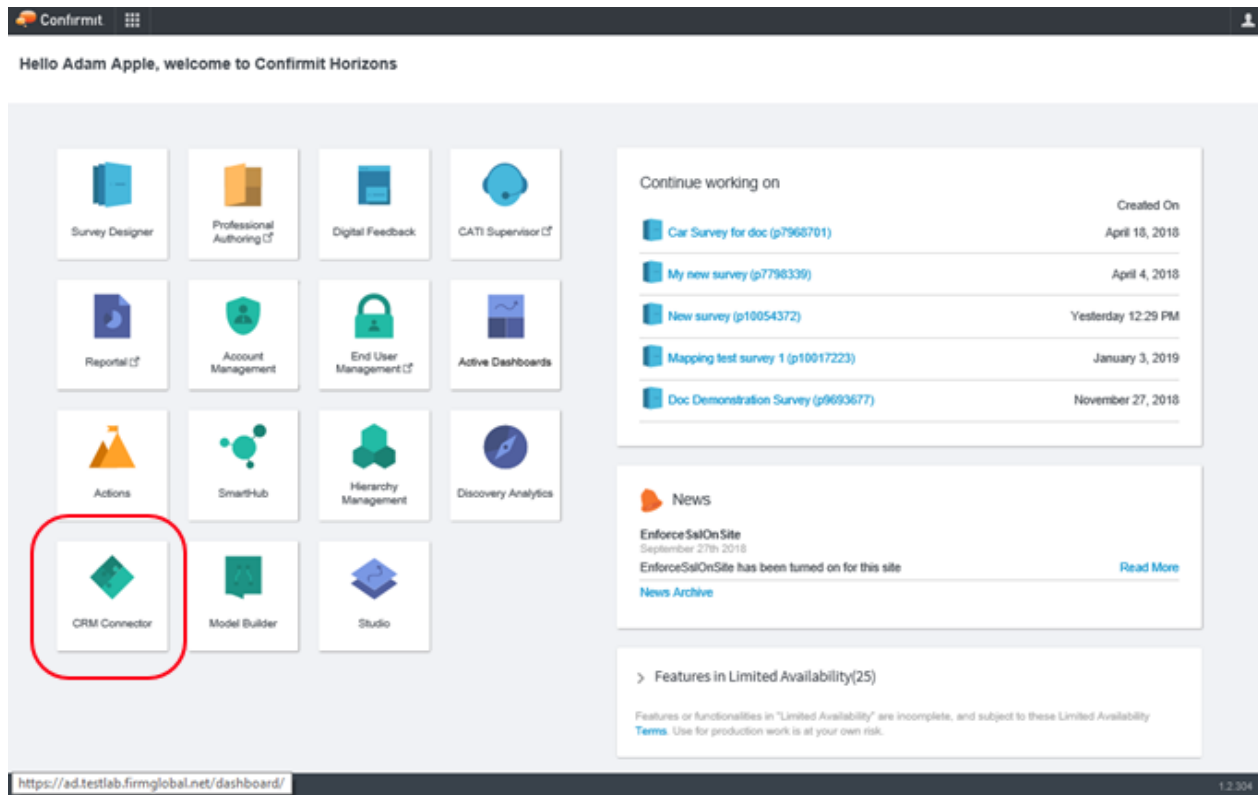


Figure 57 The CRM Connector tile in Horizons

Use of this data connector feature requires both a an MS Dynamics login and a Confirmit Horizons Professional Authoring login. The feature will log into the MS Dynamics APIs to access the CRM data.

2.1.3. Job List View

The starting page for this AddOn is the job list view. Here you will see any CRM Connector jobs listed which have been setup under your Confirmit login to transfer data from any Microsoft Dynamics environment.

Note: If you have setup logins to both a production and sandbox MS Dynamics environment then all of these jobs will appear in the list. However those which are not setup under the current logged-in MS Dynamics account will be labeled "Not in current account".

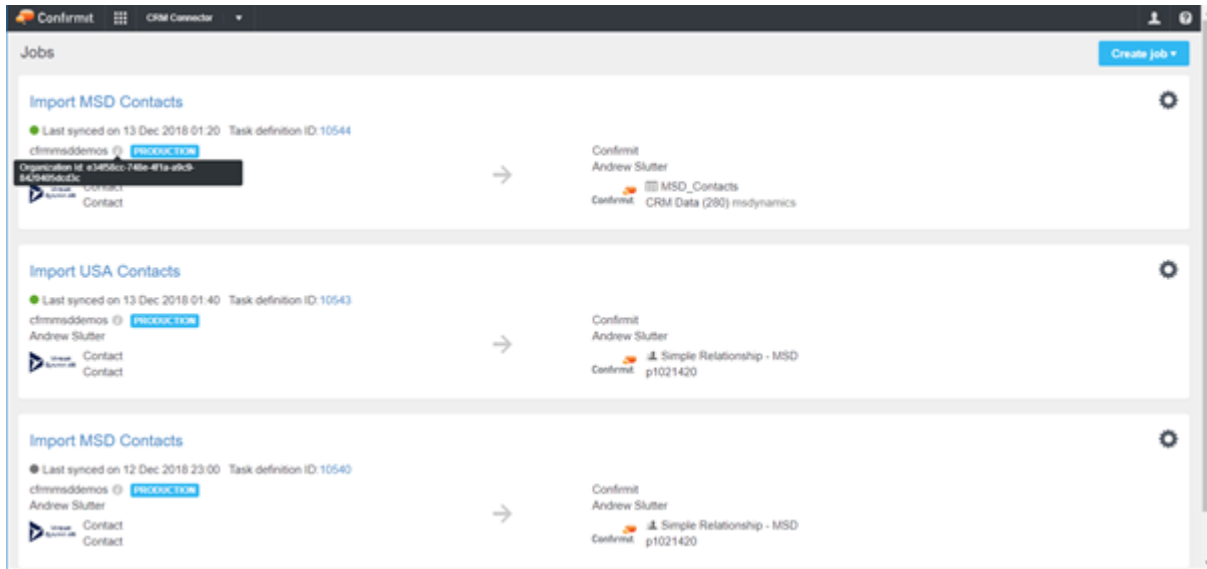


Figure 58 Example of the Job list

For each job in the job list, the following information is provided:

- The Job Label - a description of the data transfer job.
- Information on recent data synchronization – for recurring transfers, the time and date of the most recent synchronization is shown. If that transfer succeeded there is a green circle. If that transfer failed there is a red circle. If the job is not setup to recur the circle will be grey.
- The task definition ID – this number is a link to the logs associated with this job. You can click on this link to view the detailed history of this job in the Confirmit Horizons task system.
- The Confirmit Horizons Company name for the Confirmit Horizons User.
- The Confirmit Horizons User Name.
- The Confirmit Horizons Survey Name (Import jobs write in to this survey, whereas export jobs read from this survey).
- The Confirmit Horizons Survey ID.
- The MS Dynamics environment organization name.
- The MS Dynamics organization id – hover over the info icon to see this id.
- The MS Dynamics Object Name (Import jobs read from this primary object, whereas export jobs write to this object).
- The MS Dynamics Object ID.
- An icon identifies the MS Dynamics environment either as a Sandbox org or a Production org.
- An icon identifies the Confirmit source table type for exports or the target table for imports – The  icon indicates you are exporting from the Confirmit Horizons respondent table into MS Dynamics, or importing into the Confirmit Horizons respondent table from MS Dynamics. The  icon means you are exporting Confirmit Horizons survey response data into MS Dynamics. The  icon means you are importing data from MS Dynamics into a Confirmit Horizons custom data table.
- Log in button – if you have not logged into MS Dynamics, you may see a log-in button on the job. Click this to log in to MS Dynamics. You must be logged in to the CRM if you want to change the job or see additional details about it.

- Information / warning messages – if the Confirmit Horizons survey has been archived or deleted you may see a warning message about that. Similarly if the MS Dynamics object associated with a job is not accessible or deleted you may see a message about that, too.

In cases where you are logged into a different MS Dynamics environment than the one associated with a CRM Connector job, some information about the MS Dynamics environment and object may not be accessible so it will not be visible in the Job List.

Note that for each job there is also an expandable menu of Actions on the right side of the page. These actions allow you to manage the jobs, edit them, or delete them if they are no longer needed.

2.1.4. Logging in to MS Dynamics

When using CRM Connector, at various times you may need to log into MS Dynamics in order to see information stored in the MS Dynamics environment or make changes to it. When a MS Dynamics login is required, you will be presented with the following login screen:

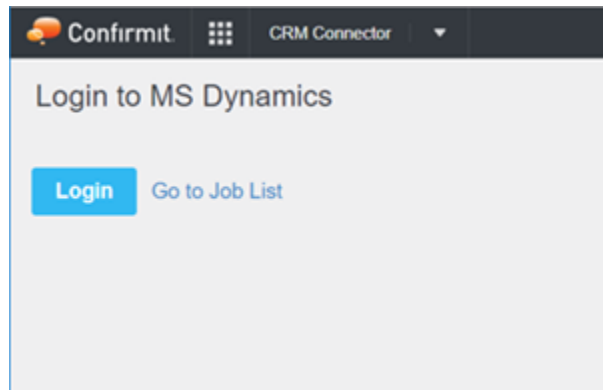


Figure 59 The MS Dynamics login dialog

1. Click **Login**.

The Login page opens.

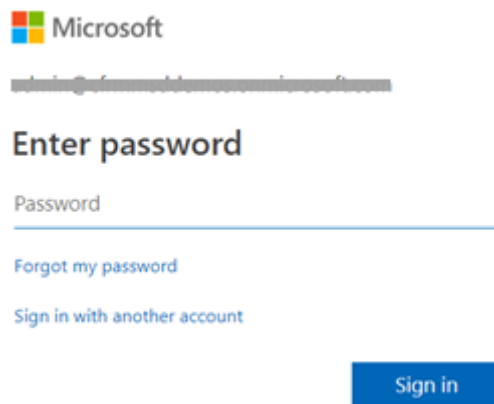


Figure 60 The Login page

2. Enter your MS Dynamics login credentials and click **Sign In**.

After you click **Sign In**, you will then be logged into MS Dynamics and can proceed with the next step to use the feature.

First-time Login Initial Authorization

The first time you login to MS Dynamics, you will be asked to give authorization for CRM Connector to connect to your MS Dynamics environment. In that case you will see this login screen:

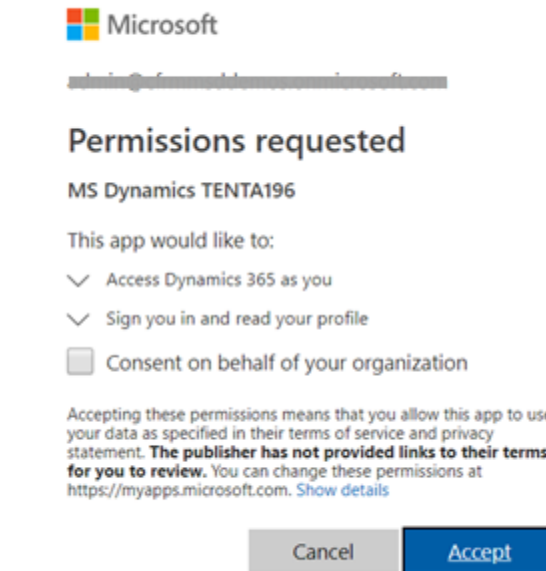


Figure 61 Providing authorization

CRM Connector for MS Dynamics uses an authorization protocol called OAUTH to log into the Dynamics environment in order to transfer the requested data. This step is part of that flow, and in order to proceed, you must agree to allow the CRM Connector to login to Dynamics. You can revoke this permission at any time.

When transferring data at scheduled times in the future, CRM Connector for MS Dynamics uses an Application User, called «Confirmit CRM Connector App», which is distinct from the user who is logged into the interactive UI. The user will also be assigned a security role «Confirmit CRM Connector App User». The benefit of this approach is that you can separately manage the data access permissions of the Application User. Note that, if the Application User does not have the permissions needed to read or manage the data tables that you want to access in MS Dynamics, then CRM Connector will have an error. These permissions can be adjusted by the MS Dynamics Administrator to suit your particular needs.

The first time you run a CRM Connector job, the Application User will be created automatically by CRM Connector.

2.2. Transferring Data from MS Dynamics to Confirmit

Note: CRM Connector for MS Dynamics is a company add-on and is subject to payment. If your company has not licensed the add-on then the CRM Connector for MS Dynamics link will not be visible on your home page. Refer to the Confirmit Acceptable Usage Policies (AUP) for further details.

Only Chrome and Firefox browsers are currently supported.

CRM Connector for MS Dynamics (Dynamics to Confirmit) enables you to setup and manage recurring jobs to import CRM data from MS Dynamics into Confirmit Horizons through an easy-to-use wizard. The imported CRM data can either be added to the survey's respondent table, or it can be imported into a custom data table.

Once CRM data is in the respondent table, the data can feed into Confirmit for a variety of uses:

- Personalization of e-mail invitations.

- Capture as background variables in surveys to personalize survey flow and survey experience.
- Feed into Confirmit action management.
- Feed into Confirmit data visualization and reporting tools.

On the other hand, when CRM data has been loaded into custom data tables, it is easily accessed from Studio reporting via CDL. One advantage of custom data tables is that they can import larger text data, whereas the respondent table currently only allows text fields of up to 255 characters.

The interactive mode of CRM Connector for MS Dynamics requires two user logins:

1. Microsoft Dynamics login
2. Confirmit Horizons Professional Authoring login

Important

When the data transfer job has been established in the CRM Connector interactive mode, and subsequently runs in the recurring background mode, it will run under a special application user named "Confirmit CRM Connector App User". The security permissions and privileges of that user are managed inside Microsoft Dynamics by the Role: "Confirmit CRM Connector App User". The role and user are set up automatically the first time someone uses the wizard. However, it is important that the MS Dynamics admin ensures this Role has the read and write permissions for the entities and fields in the CRM, otherwise CRM Connector will not work in the background mode.

Note: Your access to MS Dynamics data is controlled via the MS Dynamics user's settings inside MS Dynamics. If your MS Dynamics user is not a full administrative user and you are unable to see some MS Dynamics objects or fields inside CRM Connector, please review the MS Dynamics user's field-level access rights.

Important

Access to your MS Dynamics data is governed by MS Dynamics' Acceptable Usage Policies (AUP). To maintain optimum performance and ensure that the MS Dynamics API is available to all MS Dynamics customers, MS Dynamics imposes daily API usage limits. It is your responsibility to ensure that you do not exceed your MS Dynamics API usage limits. If you exceed the limits, it could temporarily disable CRM Connector as well as your other MS Dynamics integrations.

2.2.1. The Procedures

There are three main procedures for this feature:

- Set up a new data transfer job to a respondent table (see How to Set Up a New Data Transfer Job (MS Dynamics to Confirmit Respondent Table) on page 56 for more information)
- Set up a new data transfer job to a custom data table (see How to Set Up a New Data Transfer Job (MS Dynamics to Confirmit Custom Data Table) on page 64 for more information).
- Modify the Fetch XML query or field mapping of an existing data transfer job (see How to Modify an Existing Job Field Mapping (MS Dynamics to Confirmit) on page 72 for more information).

2.2.1.1. How to Set Up a New Data Transfer Job (MS Dynamics to Confirmit Respondent Table)

Create the job

1. Go to the **Create job** menu in the upper-right corner of the Job List and select **Dynamics to Confirmit**.
2. To define where the CRM data is to be stored, select **Respondent table** from the Target type drop down menu.
3. Enter a job name to uniquely identify this job.
4. Select the target survey into which you will import the CRM data.

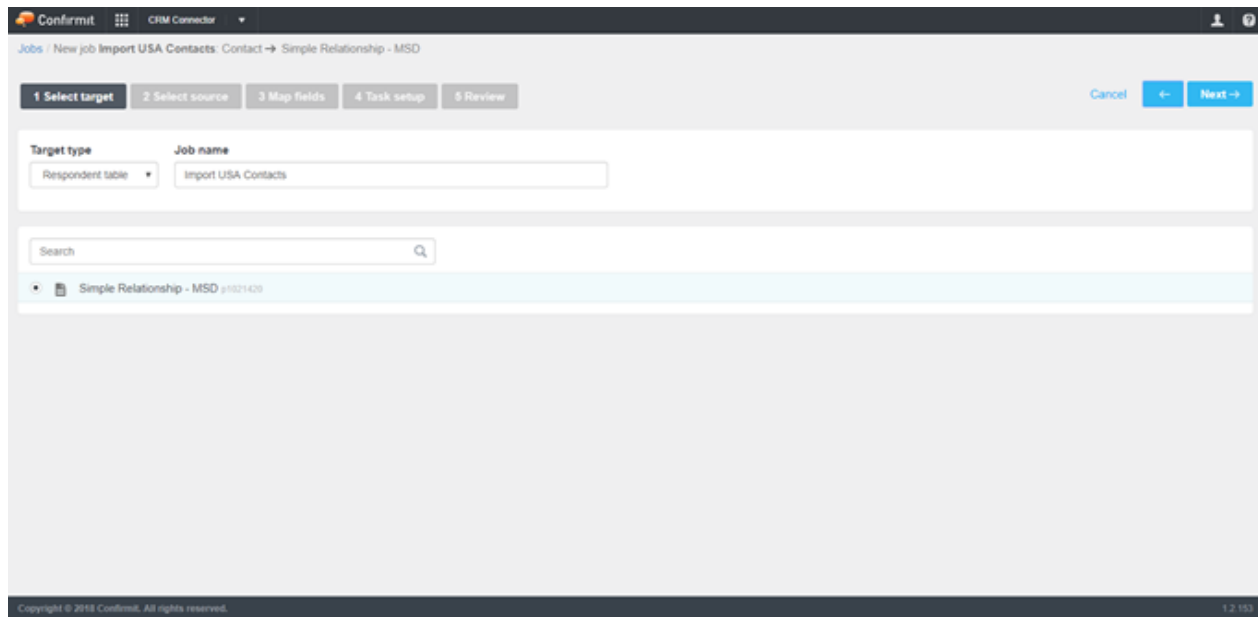


Figure 62 Selecting the target survey

5. Click **Next** to proceed.

The data is imported into the survey's respondent table.

Important

The field width on the respondent table is limited to 255 characters. If you plan to import text data from MS Dynamics and the field width in MS Dynamics is larger, then the text will be truncated during import.

Define which CRM data fields to import

You will define a FetchXML query to specify which data fields will be exported from MS Dynamics and imported into Confirmit Horizons. You can use the FetchXML builder UI to generate the query, and you can edit the FetchXML query directly using the FetchXML editor. You can also switch between the FetchXML builder and editor so that you have the ability to adjust or modify the basic query generated by the FetchXML builder. After this query has been defined, you will map the selected MS Dynamics fields to Confirmit Horizons fields.

1. First, decide which MS Dynamics records you wish to include when you import data from MS Dynamics to Confirmit:
 - **All records** - in this mode, all records matching the FetchXML query will be imported
 - **New records** - in this mode, any records that match the FetchXML query will be imported, but the query should be written so that only records that were created since the last transfer will be included. When selected, the FetchXML builder flow will automatically generate the query with an appropriate filter condition using the special macro called :LAST_SYNC_DATETIME.

Example FetchXML query:

```
<fetch mapping="logical">
  <entity name="contact">
    <attribute name="contactid"/>
    <filter>
      <condition attribute="createdon" operator="gt" value=":LAST_SYNC_DATETIME" />
    </filter>
  </entity>
```

</fetch>

- **Changed records** - in this mode, any records that match the FetchXML query will be imported, but the query should be written so that only records that were changed or created since the last transfer will be included. When selected, the FetchXML builder flow will automatically generate the query with an appropriate filter condition using the special macro called :LAST_SYNC_DATETIME.

Example FetchXML query:

```
<fetch mapping="logical">
  <entity name="contact">
    <attribute name="contactid"/>
    <filter>
      <condition attribute="modifiedon" operator="gt" value=":LAST_SYNC_DATETIME" />
    </filter>
  </entity>
</fetch>
```

When the FetchXML query is executed, if you have used :LAST_SYNC_DATETIME, the macro will be replaced with the actual date-time when CRM Connector most recently ran without errors. This makes it much easier for you to setup queries that will only import records that were recently edited or changed.

If the query has never run before, then it will be replaced with a date-time at the beginning of the epoch, and so it will initially include all historical records in the query response.

2. Use the FetchXML Builder to generate your query

- o Select a primary MS Dynamics query object/table from which data will be imported. When you select the object, the list of fields available on that object is shown in the MS Dynamics field list menu.
- o Select which MS Dynamics field(s) should be imported using the field list menu. You can filter the list to more easily search for a field. The field names shown are the MS Dynamics API names (not the MS Dynamics field labels). Use the > button to add the fields you want to import to the list of fields to transfer.
- o (Optional) Add filter criteria to be applied when selecting the records. If filters are defined, only query results matching the filter(s) will be included in the transfer. First, select the field name from the list of available fields. The fields listed are the API names of the fields on the primary query object; in parenthesis next to each field is the MS Dynamics data type. Next, select a filtering operator from the list of choices (ie =, !=, etc). Finally, add the filter criteria. You can add multiple filters, which will be all be applied to the query. In the example figure a filter is added to exclude any records unless the Address1_Country field contains the text 'USA'

As you make changes in the FetchXML builder, the changes are reflected in the FetchXML editor. If you have selected «New Records» or «Changed Records», then an appropriate filter condition is added automatically to the query, too.

Note: Some MS Dynamics field data types are unsupported. In many cases, unsupported fields are completely excluded from the query builder to keep the user experience uncluttered (these unsupported types are: BigInt, CalendarRules, ManagedProperty, Virtual). There are also some types that are unsupported that will appear as greyed out (these types are: Memo, and PartyList). As an example, in the figure below, the field IsPrivate is greyed out because it is an unsupported type.

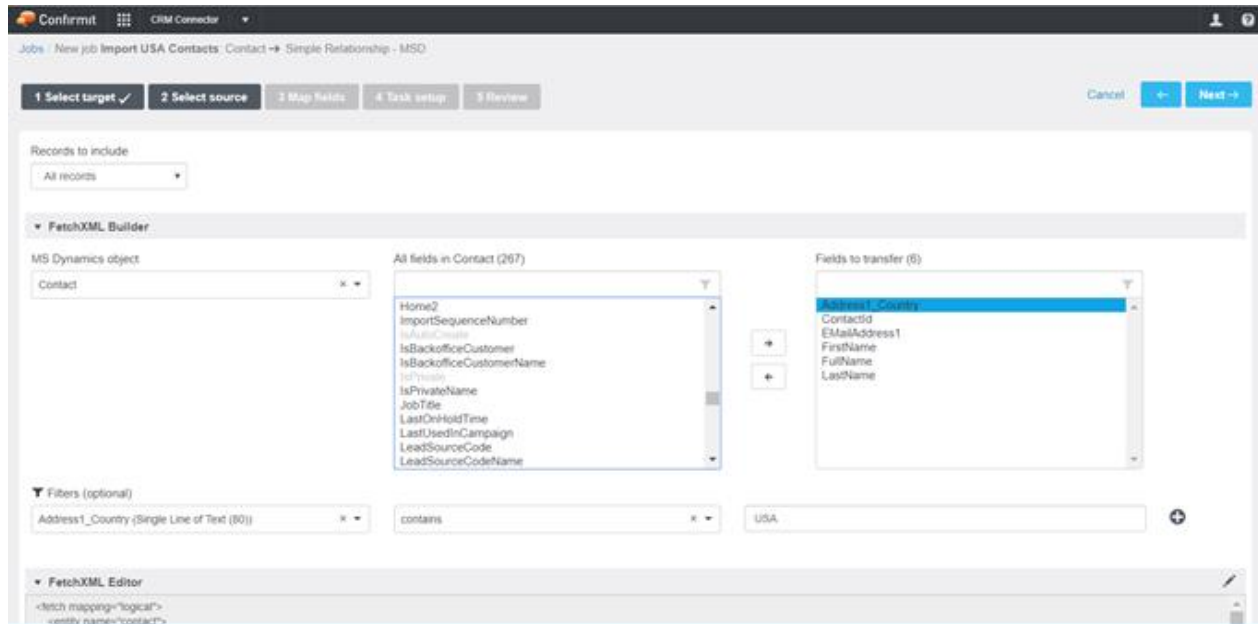


Figure 63 Defining query with FetchXML Builder

3. (Optional) Manually edit the query using the FetchXML Editor

If you want to change the query created by the FetchXML builder, you can update the query using the FetchXML editor. To switch to the FetchXML editor, click on the Pencil icon in the upper right corner of that region on the page. One reason to change the FetchXML might be if you want to import data from fields on objects related to the primary object. In Figure 132, we have added company.accountid and company.accountname, as examples of references to fields on a related object. In this case, these fields are not on the Contact object, but instead sit on the Account object, which is related to the Contact via the Company relationship. So, this is how FetchXML approaches multi-object queries.

Refer to the MS Dynamics documentation for detailed discussion on FetchXML query syntax. Also, note that if you use the Advanced Find function inside MS Dynamics, you can use that UI to generate a multi-object FetchXML query and export the query syntax. Note that we only support the syntax needed for multi-object field selection and filtering, and don't guarantee to support all syntax constructs.

If you have selected «New Records» or «Changed Records», you still need to use :LAST_SYNC_DATETIME as part of the filter conditions of your query. However, you could change it to use a different filter criteria than the default generated by the FetchXML builder.

When the Job is actually submitted, we replace the :LAST_SYNC_DATETIME with the date-time when CRM Connector most recently ran. This makes it much easier for you to setup an integration that only imports records that were recently edited or changed since the last data transfer.

4. Click the **Test Query** button to submit your query to MS Dynamics to test it.

You must test the query before proceeding to the next step to map the fields selected in the query. When you test the query, it is submitted to the MS Dynamics API, and the first 200 records of the query response are displayed so you can check to see that the query behaves as expected. If there is an error in the query or with the MS Dynamics platform, a message is displayed.

Important

MS Dynamics FetchXML queries can timeout. If your query is too complex or MS Dynamics has too much load on the system when you submit the query and it cannot be completed, it will fail. This could also happen when running the query in batch mode. If the query is timing out, consider optimizing the table structure in MS Dynamics or simplifying the query. Work with your MS Dynamics administrator and MS Dynamics customer support to resolve this sort of FetchXML performance issue.

When importing data from MS Dynamics, the application will use the MS Dynamics Application user, not the MS Dynamics user logged in during interactive mode. These users could have different access privileges in the MS Dynamics CRM. So, be aware that even if the job works in the interactive mode, it could fail in the batch mode because the Application User is not configured to read the necessary data tables and fields.

The screenshot shows the FetchXML Editor interface. At the top, there are dropdown menus for 'select field' and 'select operator', followed by a text input field and a plus icon. Below this is the 'FetchXML Editor' section, which contains a text area with the following XML query:

```
<filter type="and">
  <condition attribute="address1_country" operator="eq" value="USA" />
</filter>
<link-entity name="account" from="accountid" to="parentcustomerid" link-type="inner" alias="company">
  <filter type="and">
    <condition attribute="industrycode" operator="not-null" />
  </filter>
  <attribute name="name" />
  <attribute name="accountid" />
</link-entity>
```

Below the editor is a 'Test query' button. Underneath, a message states 'Sample data: displaying 13 records from the FetchXML query.' followed by a table of sample data.

contact.fullname	contact.telephone1	contact.contactid	contact.company.name	contact.company.accountid
Allison Brown	1-555-555-5555	6da0e5b9-88df-e311-b8e5-6c3be5a8b200	The Phone Company	cca19cdd-88df-e311-b8e5-6c3be5a8b200
Andrew Dixon	555-789-8856	5da0e5b9-88df-e311-b8e5-6c3be5a8b200	Litware	bca19cdd-88df-e311-b8e5-6c3be5a8b200
Eric Gilmore	408-875-4575	bfa2e5b9-88df-e311-b8e5-6c3be5a8b200	Southridge Video	c8a19cdd-88df-e311-b8e5-6c3be5a8b200
Hugo Garcia	789-741-8564	a9a2e5b9-88df-e311-b8e5-6c3be5a8b200	Litware	bca19cdd-88df-e311-b8e5-6c3be5a8b200
Isaac Lightner	1-555-555-0131	48b6c6a5-88d2-e411-80e9-c4346bad5694	Microsoft	d3ae1b3a-8bd2-e411-80ef-c4346bac7be8
Jason Kozleski	789-741-8567	19a4e5b9-88df-e311-b8e5-6c3be5a8b200	Litware	bca19cdd-88df-e311-b8e5-6c3be5a8b200
Kim Abercrombie	408-875-4582	a230c305-4fc8-e411-80ee-c4346bac7be8	Southridge Video	c8a19cdd-88df-e311-b8e5-6c3be5a8b200

Figure 64 Editing a query with FetchXML editor and viewing sample data returned by a query

- Once you are satisfied with your query, click **Next** to proceed.

Map the selected MS Dynamics fields to Horizons fields

Now that you have selected the fields for import via the FetchXML query, they need to be mapped to fields in the Confirmit respondent table.

- Select the Import mode from the available choices:
 - Insert** – in this mode, MS Dynamics data retrieved via the FetchXML query will be added as new records to the respondent table.
 - Append** – in this mode, MS Dynamics data retrieved via the FetchXML query will only be added if there is not already a respondent record matching the defined key. For this option a key field must be defined in the mapping.
 - Merge** – in this mode, MS Dynamics data retrieved via the FetchXML query will be added if there is not already a respondent record matching a defined key, and if there is an existing record matching the defined key then the existing record will be updated with the FetchXML query results. For this option a key field must be defined in the mapping.

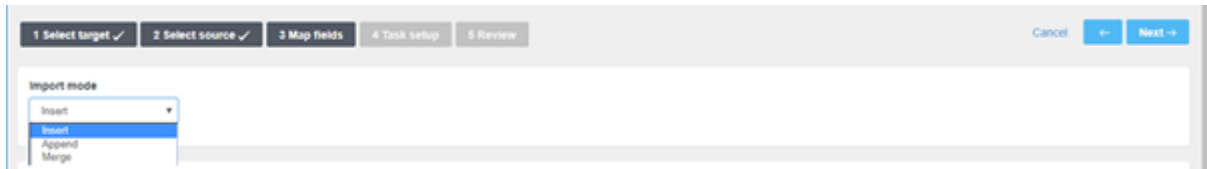


Figure 65 Selecting the import mode

2. Map the MS Dynamics fields to Confirmit fields.

Choose the desired mapping option for each field from the menu in the Action column.

- o If you choose **Create new**, then you provide a new respondent field name, and the MS Dynamics field will be mapped to a new respondent field that will be created with that name. Note that this does NOT mean a background field has also been created in the survey.
- o If you choose **Link to**, then you select an existing respondent field name and the MS Dynamics field will be mapped to that existing respondent field.

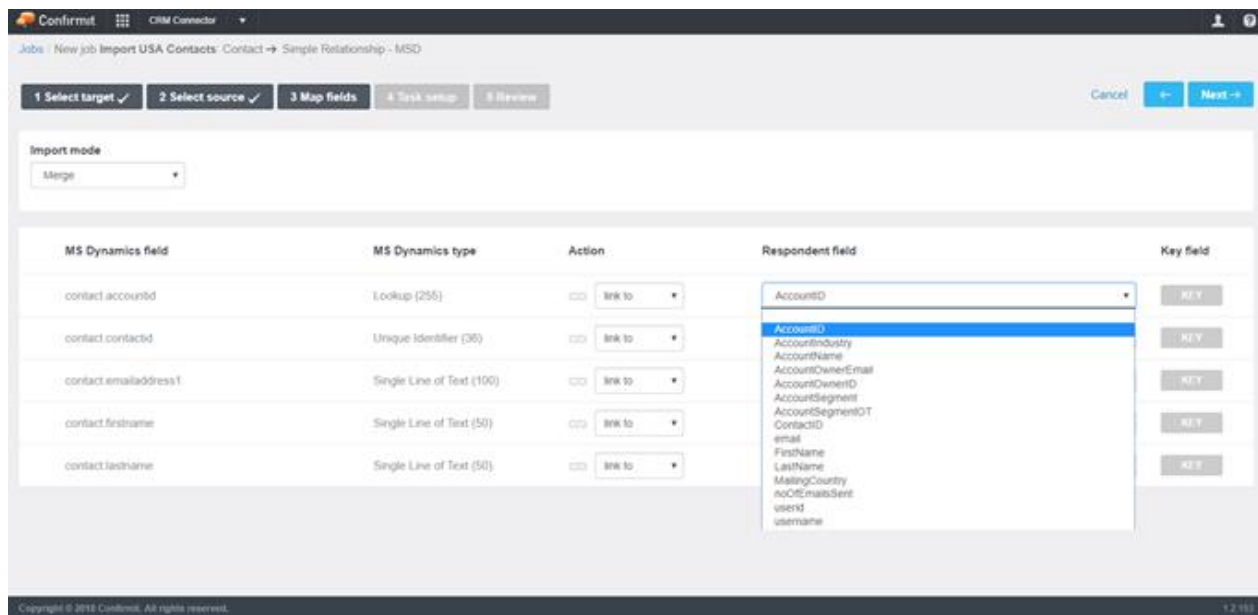


Figure 66 Mapping the fields

3. (Optional) Select a key

- If you have selected Append or Merge as the respondent table Import Mode then you must define a key field so that it is clear which is to be used as the unique record. For these two import modes, the Key Field column becomes available. To select a field as the key, click on the **Key** button in the row containing the key field. It is important that the key field is unique; if it is not then this process will not work correctly. Duplicates can be created when switching between the import modes, particularly when adding a key definition, so it is recommended that you set this aspect of a job and then do not change it.

Sometimes one key is not enough to make each record unique, and a composite key field is required. For example, a composite key is useful for an annual Voice of the Customer relationship survey. In this case you might only survey the Contact once per year. MS Dynamics has a unique ContactID, however when you run the survey program over multiple years you also need to survey that Contact over multiple years, so the ContactID cannot be used as the unique key by itself. In this case you could create a composite key of ContactID + Year.

To define a composite key, click on the **Key** button for multiple fields, and they will be combined to form a composite key.

MS Dynamics field	MS Dynamics type	Action	Respondent field	Key field
contact.accountid	Lookup (255)	link to	AccountID	KEY
contact.contactid	Unique Identifier (36)	link to	ContactID	KEY
contact.emailaddress1	Single Line of Text (100)	link to	email	KEY
contact.firstname	Single Line of Text (50)	link to	FirstName	KEY
contact.lastname	Single Line of Text (50)	link to	LastName	KEY

Figure 67 Defining a composite key field

- When you have completed the field mapping, click **Next** to proceed.

Set up the task

Each job creates a data processing task within the Confirmit data processing environment to execute the data transfer.

- Define when the data should be transferred:
 - Off (Sync manually)** - the task will be setup and saved but will not actually run. Use this when you plan to start running the task later.
 - Scheduled** - you may choose to run the job hourly, daily, weekly, monthly, or one time only. Select the data and time when the job is to run.

Figure 68 Setting up the task

Review and complete the setup

Before completing the job setup, review the job information. Check that the job will run when expected. Make sure the FetchXML query includes all the fields and filtering criteria that you require. Make sure the MS Dynamics fields are mapped to the expected Confirmit respondent table fields, and that any key fields are properly identified. If you need to fix anything you can go back to change it in the wizard before accepting the job.

The query section is collapsible/expandable using the triangle icon, so you will need to expand that section to review the query.

1. Click **Complete setup** to save your job.

You will then be taken to the Job Overview page of your new job.

Confirmit CRM Connector

Jobs / New job Import USA Contacts: Contact → Simple Relationship - MSD

1 Select target ✓ 2 Select source ✓ 3 Map fields ✓ 4 Task setup ✓ 5 Review

Cancel Complete setup

Task Setup

Scheduled: **Daily** Start: 12 Dec 2018 23:55 End: 12 Mar 2019
 Syncs every day at 23:55

FetchXML Query

Field mapping:

MS Dynamics field	MS Dynamics type	Action	Respondent field	Key
contact.accountid	Lookup (255)	LinkTo	AccountID	KEY
contact.contactid	Unique Identifier (36)	LinkTo	ContactID	KEY
contact.emailaddress1	Single Line of Text (100)	LinkTo	email	
contact.firstname	Single Line of Text (50)	LinkTo	FirstName	
contact.lastname	Single Line of Text (50)	LinkTo	LastName	

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Figure 69 Completing the setup

2.2.1.2. How to Set Up a New Data Transfer Job (MS Dynamics to Confirmit Custom Data Table)

Create the job

1. Go to the **Create job** menu in the upper-right corner of the Job List and select **Dynamics to Confirmit**.
2. To define where the CRM data is to be stored, select **Custom data table** from the Target type drop down menu.
3. Enter a job name to uniquely identify this job.
4. Select the hub where the custom data table for storing the CRM data will be located.
 You can choose between the existing hubs available to you as a Horizons user.
5. To write into an existing custom table, select **Existing tables** (ringed below), and select the dataset and custom data table where you want to store the CRM data.

The screenshot shows the '1 Select target' step of a job configuration. The 'Target type' is set to 'Custom data table' and the 'Job name' is 'Import MSD Contacts'. Under 'In hub', 'CRM Data' is selected. Under 'In dataset', 'msdynamics' is selected. The 'Existing tables' radio button is selected and circled in red, with a search bar below it showing 'MSD_Contacts (MSD_Contacts)'. The 'Create new table' radio button is unselected. Navigation buttons 'Cancel', 'Previous', and 'Next' are at the top right.

Figure 70 Selecting to use an existing custom data table

To write into a new custom data table, select **Create new table** (ringed below), select the dataset or create a new one, and provide a label and name for the new custom data table.

The screenshot shows the '1 Select target' step of a job configuration. The 'Target type' is set to 'Custom data table' and the 'Job name' is 'Import MSD Contacts to Custom Table'. Under 'In hub', 'CRM Data' is selected. Under 'In dataset', 'Create new table' is selected and circled in red. Below this, the 'Label' field contains 'MSD_Contacts' and the 'Dataset' dropdown shows 'New' and 'MSDynamics'. The 'Name' field contains 'MSD_Contacts'. Navigation buttons 'Cancel', 'Previous', and 'Next' are at the top right.

Figure 71 Selecting to use a new custom data table

- 6.
 7. Click **Next** to proceed.
- The data is imported into the selected custom data table.

Define which MS Dynamics data fields to import

You will define a FetchXML query to specify which data fields will be exported from MS Dynamics and imported into Confirmit Horizons. You can use the FetchXML builder UI to generate the query, and you can edit the FetchXML query directly using the FetchXML editor. You can also switch between the FetchXML builder and editor so that you have the ability to adjust or modify the basic query generated by the FetchXML builder. After this query has been defined, you will map the selected MS Dynamics fields to Confirmit Horizons fields.

1. First, decide which MS Dynamics records you wish to include when you import data from MS Dynamics to Confirmit:
 - **All records** - in this mode, all records matching the FetchXML query will be imported
 - **New records** - in this mode, any records that match the FetchXML query will be imported, but the query should be written so that only records that were created since the last transfer will be included. When selected, the FetchXML builder flow will automatically generate the query with an appropriate filter condition using the special macro called :LAST_SYNC_DATETIME.

Example FetchXML query:

```
<fetch mapping="logical">
  <entity name="contact">
    <attribute name="contactid"/>
    <filter>
      <condition attribute="createdon" operator="gt" value=":LAST_SYNC_DATETIME" />
    </filter>
  </entity>
</fetch>
```

- **Changed records** - in this mode, any records that match the FetchXML query will be imported, but the query should be written so that only records that were changed or created since the last transfer will be included. When selected, the FetchXML builder flow will automatically generate the query with an appropriate filter condition using the special macro called :LAST_SYNC_DATETIME.

Example FetchXML query:

```
<fetch mapping="logical">
  <entity name="contact">
    <attribute name="contactid"/>
    <filter>
      <condition attribute="modifiedon" operator="gt" value=":LAST_SYNC_DATETIME" />
    </filter>
  </entity>
</fetch>
```

When the FetchXML query is executed, if you have used :LAST_SYNC_DATETIME, the macro will be replaced with the actual date-time when CRM Connector most recently ran without errors. This makes it much easier for you to setup queries that will only import records that were recently edited or changed.

If the query has never run before, then it will be replaced with a date-time at the beginning of the epoch, and so it will initially include all historical records in the query response.

2. Use the FetchXML Builder to generate your query
 - o Select a primary MS Dynamics query object/table from which data will be imported. When you select the object, the list of fields available on that object is shown in the MS Dynamics field list menu.

- o Select which MS Dynamics field(s) should be imported using the field list menu. You can filter the list to more easily search for a field. The field names shown are the MS Dynamics API names (not the MS Dynamics field labels). Use the > button to add the fields you want to import to the list of fields to transfer.
- o (Optional) Add filter criteria to be applied when selecting the records. If filters are defined, only query results matching the filter(s) will be included in the transfer. First, select the field name from the list of available fields. The fields listed are the API names of the fields on the primary query object; in parenthesis next to each field is the MS Dynamics data type. Next, select a filtering operator from the list of choices (ie =, !=, etc). Finally, add the filter criteria. You can add multiple filters, which will be all be applied to the query. In the example figure a filter is added to exclude any records unless the Address1_Country field contains the text 'USA'

As you make changes in the FetchXML builder, the changes are reflected in the FetchXML editor. If you have selected «New Records» or «Changed Records», then an appropriate filter condition is added automatically to the query, too.

Note: Some MS Dynamics field data types are unsupported. In many cases, unsupported fields are completely excluded from the query builder to keep the user experience uncluttered (these unsupported types are: BigInt, CalendarRules, ManagedProperty, Virtual). There are also some types that are unsupported that will appear as greyed out (these types are: Memo, and PartyList). As an example, in the figure below, the field IsPrivate is greyed out because it is an unsupported type.

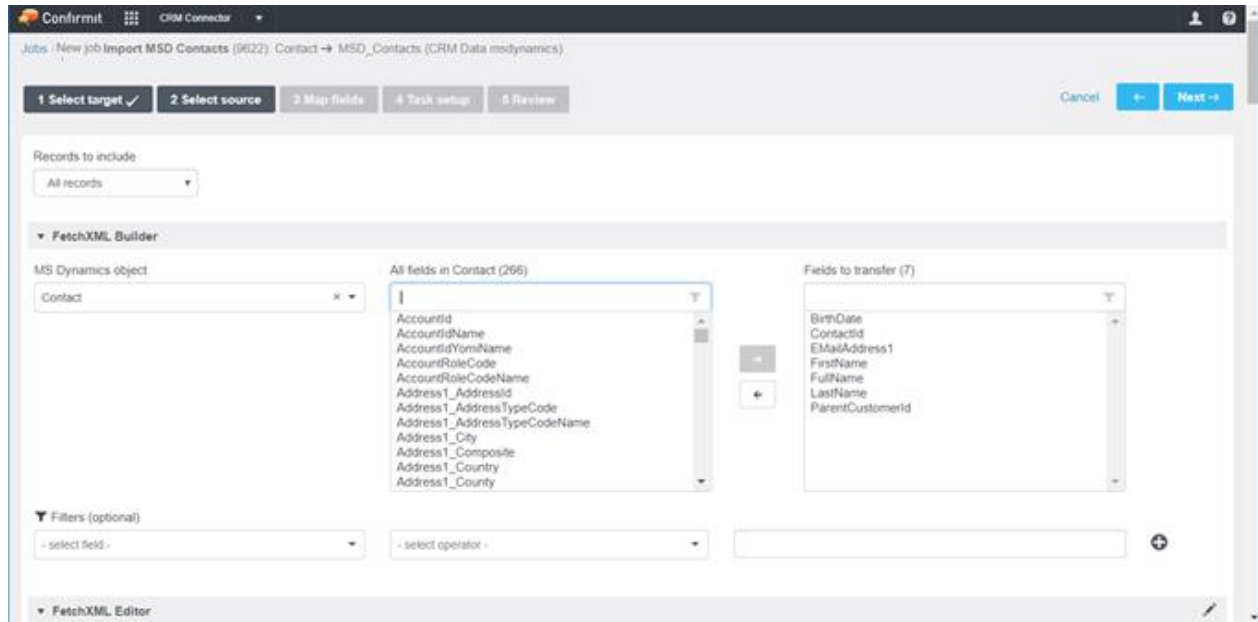


Figure 72 Defining query with FetchXML Builder

3. (Optional) Manually edit the query using the FetchXML Editor

If you want to change the query created by the FetchXML builder, you can update the query using the FetchXML editor. To switch to the FetchXML editor, click on the Pencil icon in the upper right corner of that region on the page. One reason to change the FetchXML might be if you want to import data from fields on objects related to the primary object. In Figure 132, we have added company.accountid and company.accountname, as examples of references to fields on a related object. In this case, these fields are not on the Contact object, but instead sit on the Account object, which is related to the Contact via the Company relationship. So, this is how FetchXML approaches multi-object queries.

Refer to the MS Dynamics documentation for detailed discussion on FetchXML query syntax. Also, note that if you use the Advanced Find function inside MS Dynamics, you can use that UI to generate a multi-object FetchXML query and export the query syntax. Note that we only support the syntax needed for multi-object field selection and filtering, and don't guarantee to support all syntax constructs.

If you have selected «New Records» or «Changed Records», you still need to use :LAST_SYNC_DATETIME as part of the filter conditions of your query. However, you could change it to use a different filter criteria than the default generated by the FetchXML builder.

When the Job is actually submitted, we replace the :LAST_SYNC_DATETIME with the date-time when CRM Connector most recently ran. This makes it much easier for you to setup an integration that only imports records that were recently edited or changed since the last data transfer.

4. Click the **Test Query** button to submit your query to MS Dynamics to test it.

You must test the query before proceeding to the next step to map the fields selected in the query. When you test the query, it is submitted to the MS Dynamics API, and the first 200 records of the query response are displayed so you can check to see that the query behaves as expected. If there is an error in the query or with the MS Dynamics platform, a message is displayed.

Important

MS Dynamics FetchXML queries can timeout. If your query is too complex or MS Dynamics has too much load on the system when you submit the query and it cannot be completed, it will fail. This could also happen when running the query in batch mode. If the query is timing out, consider optimizing the table structure in MS Dynamics or simplifying the query. Work with your MS Dynamics administrator and MS Dynamics customer support to resolve this sort of FetchXML performance issue.

When importing data from MS Dynamics, the application will use the MS Dynamics Application user, not the MS Dynamics user logged in during interactive mode. These users could have different access privileges in the MS Dynamics CRM. So, be aware that even if the job works in the interactive mode, it could fail in the batch mode because the Application User is not configured to read the necessary data tables and fields.

The screenshot shows the FetchXML Editor interface. At the top, there are dropdown menus for selecting fields and operators. Below this is the FetchXML Editor area, which contains a code editor with the following XML snippet:

```
<fetch mapping="logical">
  <entity name="contact">
    <attribute name="birthdate">
    <attribute name="contactid">
    <attribute name="emailaddress1">
    <attribute name="firstname">
    <attribute name="fullname">
    <attribute name="lastname">
    <attribute name="parentcustomerid">
  </entity>
</fetch>
```

Below the editor is a "Test query" button. Underneath the button, it says "Sample data: displaying 79 records from the FetchXML query." Below this is a table with the following columns: contact.birthdate, contact.contactid, contact.emailaddress1, contact.firstname, contact.fullname, contact.lastname, and contact.parentcustomerid. The table contains several rows of sample data.

contact.birthdate	contact.contactid	contact.emailaddress1	contact.firstname	contact.fullname	contact.lastname	contact.parentcustomerid
1966-12-12T00:00:00+01:00	455b158c-541c-e511-80d3-3863bb347ba8	vincent@adatum.com	Vincent	Vincent Lauriant	Lauriant	475b158c-541c-e511-80d3-3863bb347ba8
1985-02-25T00:00:00+01:00	49a0e5b9-88df-e311-b8e5-6c3be5a8b200	Adrian@adventure-works.com	Adrian	Adrian Dumitrascu	Dumitrascu	a8a19cdd-88df-e311-b8e5-6c3be5a8b200
1974-02-22T00:00:00+01:00	4ba0e5b9-88df-e311-b8e5-6c3be5a8b200	Cathan@alpineskihouse.com	Cathan	Cathan Cook	Cook	aaa19cdd-88df-e311-b8e5-6c3be5a8b200
1984-05-14T00:00:00+01:00	4da0e5b9-88df-e311-b8e5-6c3be5a8b200	brian@bluewin.ch	Brian	Brian LaMee	LaMee	aaa19cdd-88df-e311-b8e5-6c3be5a8b200

Figure 73 Editing a query with FetchXML editor and viewing sample data returned by a query

5. Once you are satisfied with your query, click **Next** to proceed.

Map the selected MS Dynamics fields to Horizons fields

Now that you have selected the fields for import via the FetchXML query, they need to be mapped to fields in the Confirmit custom data table.

1. Select the Import mode from the available choices:

- **Append** – in this mode, MS Dynamics data retrieved via the FetchXML query will only be added if there is not already a respondent record matching the defined key. For this option a key field must be defined in the mapping.
- **Merge** – in this mode, MS Dynamics data retrieved via the FetchXML query will be added if there is not already a respondent record matching a defined key, and if there is an existing record matching the defined key then the existing record will be updated with the FetchXML query results. For this option a key field must be defined in the mapping.

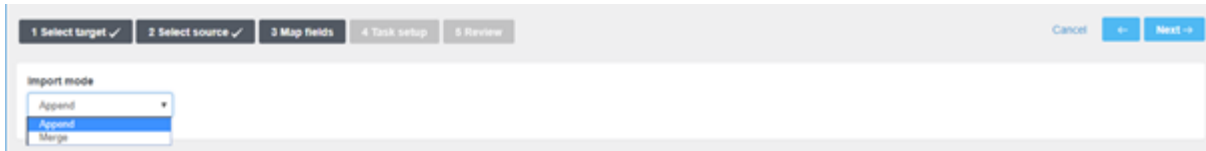


Figure 74 Selecting the import mode

2. Map the MS Dynamics fields to Confirmit fields.

Choose the desired mapping option for each field from the menu in the Action column.

- o If you choose **Create new**, then you provide a new respondent field name, and the MS Dynamics field will be mapped to a new respondent field that will be created with that name.

When creating a new field, you have the choice of several custom table data field types: Open text, Numeric, Date, Single. A significant advantage of importing CRM data into custom data tables is that the data will be properly typed.

When writing into a custom data table field of the single (categorical) type, then the data must also be defined as a MS Dynamics picklist (categorical) variable in MS Dynamics. Conversion from MS Dynamics text into a Confirmit single (i.e. auto-coding) is not supported. This ensures that best practices are used and that data is properly categorized at the source inside the CRM prior to importing it into Horizons.

- o If you are creating a new custom data table (as shown below), then you will only have the option to create new fields.
- o If you choose **Link to**, then you select an existing field name and the MS Dynamics field will be mapped to that existing field.

MS Dynamics field	MS Dynamics type	Action	Custom table field	Key field
contact.birthdate	Date and Time	link to	birthdate (birthdate)	
contact.contactid	Unique Identifier (36)	link to	contactid (contactid) [key]	KEY
contact.emailaddress1	Single Line of Text (100)	link to	emailaddress1 (emailaddress1)	
contact.firstname	Single Line of Text (50)	link to	firstname (firstname)	
contact.fullname	Single Line of Text (100)	link to	fullname (fullname)	
contact.lastname	Single Line of Text (50)	link to	lastname (lastname)	
contact.parentcustomerid	Customer (0)	link to	accountid (accountid)	

Figure 75 Mapping the fields

3. Select a key

- When importing into custom data tables you must always define a key field for the records. To select a field as the key, click the Key button in the row containing the key field. It is important that the key field is unique; if it is not then this process will not work correctly. Duplicates can be created when switching between the import modes, particularly when changing a key definition, so it is recommended that you set this aspect of a job and then do not change it.

Sometimes one key is not enough to make each record unique, and a composite key field is required. For example, a composite key is useful for an annual Voice of the Customer relationship survey. In this case you might only survey the Contact once per year. MS Dynamics has a unique ContactID, however when you run the survey program over multiple years you also need to survey that Contact over multiple years, so the ContactID cannot be used as the unique key by itself. In this case you could create a composite key of ContactID + Year.

To define a composite key, click on the **Key** button for multiple fields, and they will be combined to form a composite key.

4. When you have completed the field mapping, click **Next** to proceed.

Set up the task

Each job creates a data processing task within the Confirmit data processing environment to execute the data transfer.

1. Define when the data should be transferred:

- Off (Sync manually)** - the task will be setup and saved but will not actually run. Use this when you plan to start running the task later.
- Scheduled** - you may choose to run the job hourly, daily, weekly, monthly, or one time only. Select the data and time when the job is to run.

Figure 76 Setting up the task

Review and complete the setup

Before completing the job setup, review the job information. Check that the job will run when expected. Make sure the FetchXML query includes all the fields and filtering criteria that you require. Make sure the MS Dynamics fields are mapped to the expected Confirmit custom data table fields, and that any key fields are properly identified. If you need to fix anything you can go back to change it in the wizard before accepting the job.

The query section is collapsible/expandable using the triangle icon, so you will need to expand that section to review the query.

1. Click **Complete setup** to save your job.

You will then be taken to the Job Overview page of your new job.

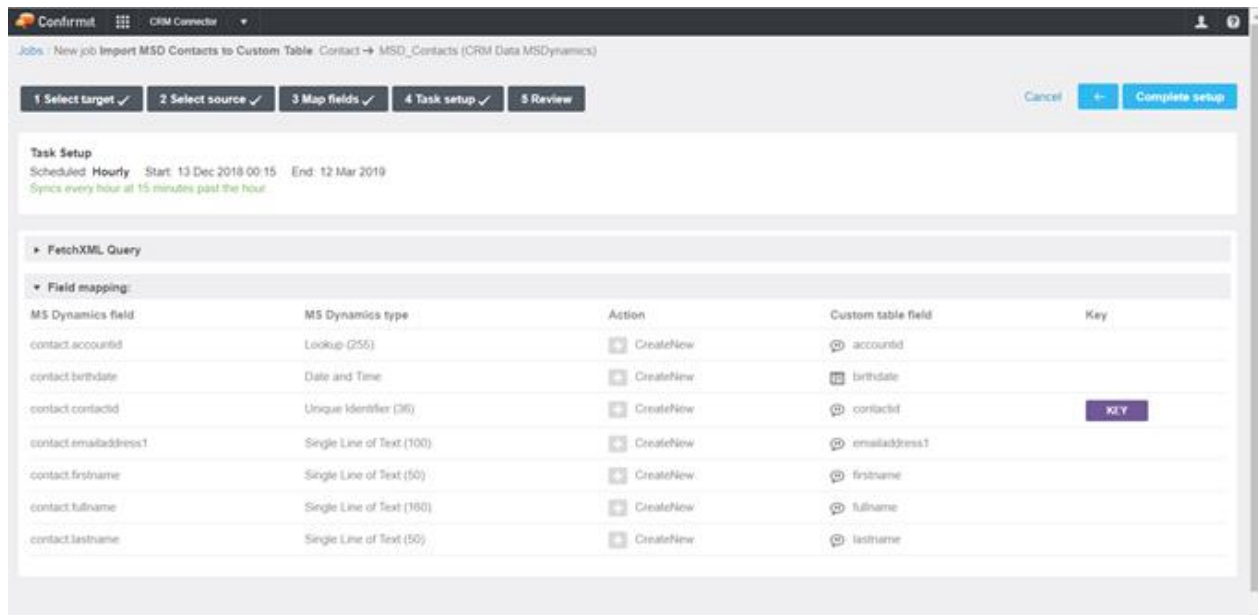


Figure 77 Reviewing the job

2.2.1.3. How to Modify an Existing Job Field Mapping (MS Dynamics to Confirmit)

After setting up a job, you may decide that you need to change the survey data you wish to transfer.

Note: Although we discuss reconfiguring jobs to import to the respondent table in this section, the workflow is the same when changing jobs to import into custom data tables.

1. To edit an existing job, select **Edit Linking** from the Actions drop-down for that job.

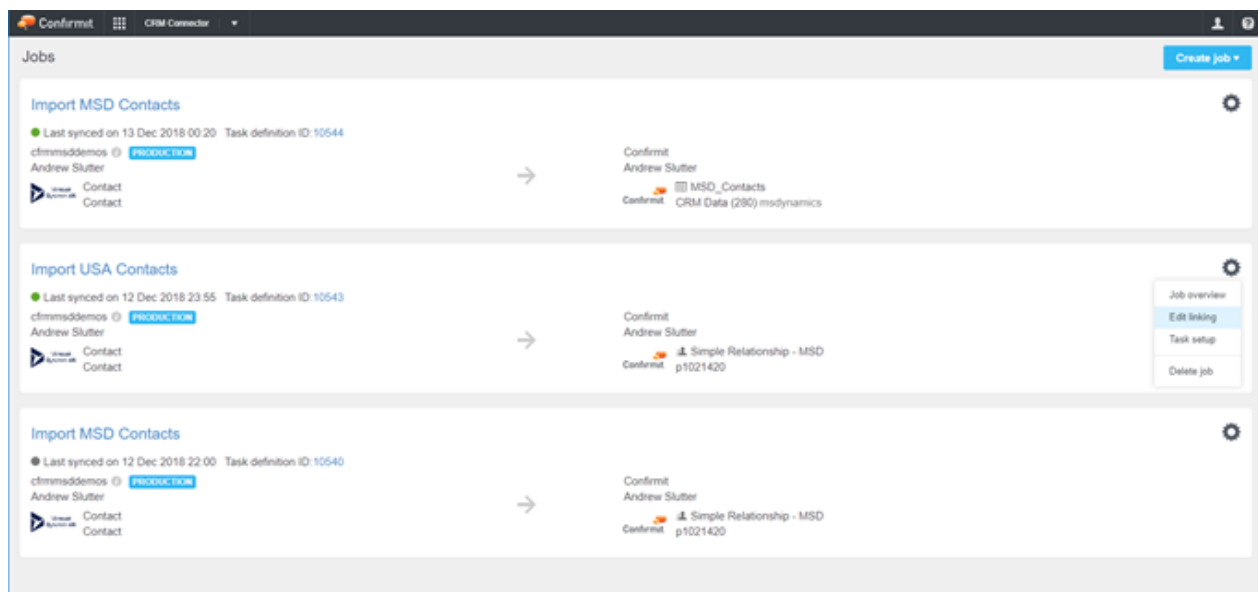


Figure 78 Editing an existing job

2. Make any changes necessary to the transfer job's target inside Confirmit.

You can rename the job or write to a different survey respondent table if desired.

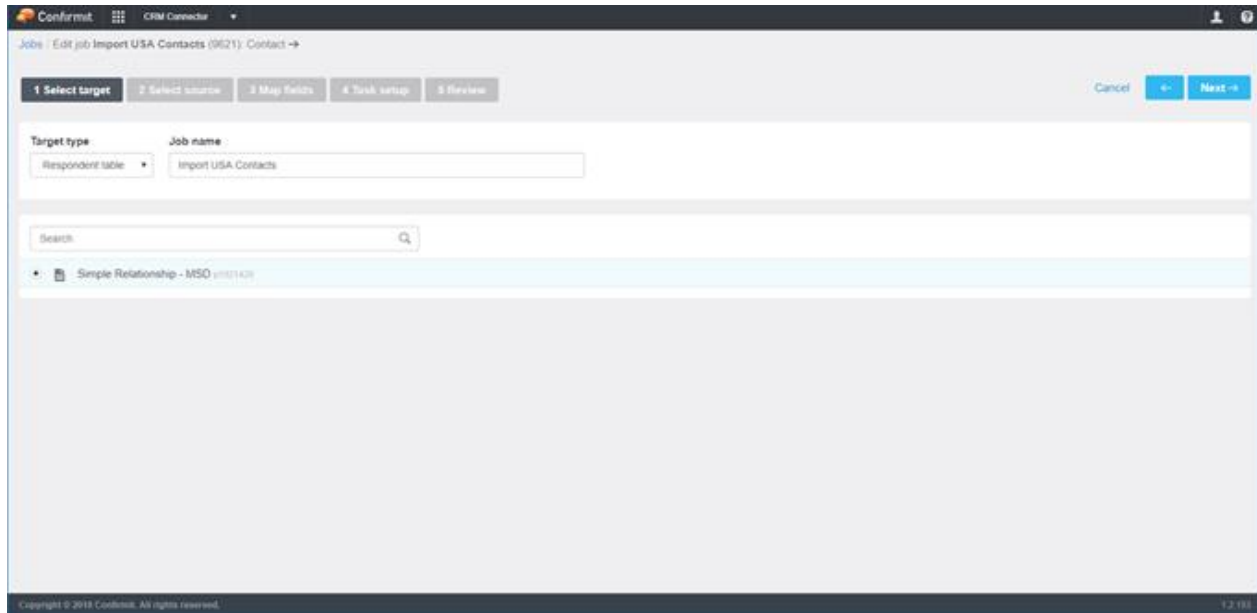


Figure 79 Change the job name or target survey respondent table

3. Complete the remaining steps of the wizard (Select source, Map fields, Task Setup, Review).
You have the flexibility to change the FetchXML query, the field mapping or the task timing. Be careful if changing the import mode - if you attempt to add or change the key, you might have some duplicate respondents that need to be removed in the respondent editor.
4. After reviewing, save your changes to the job.
When you save the changes, you will be taken to the Job Overview page.

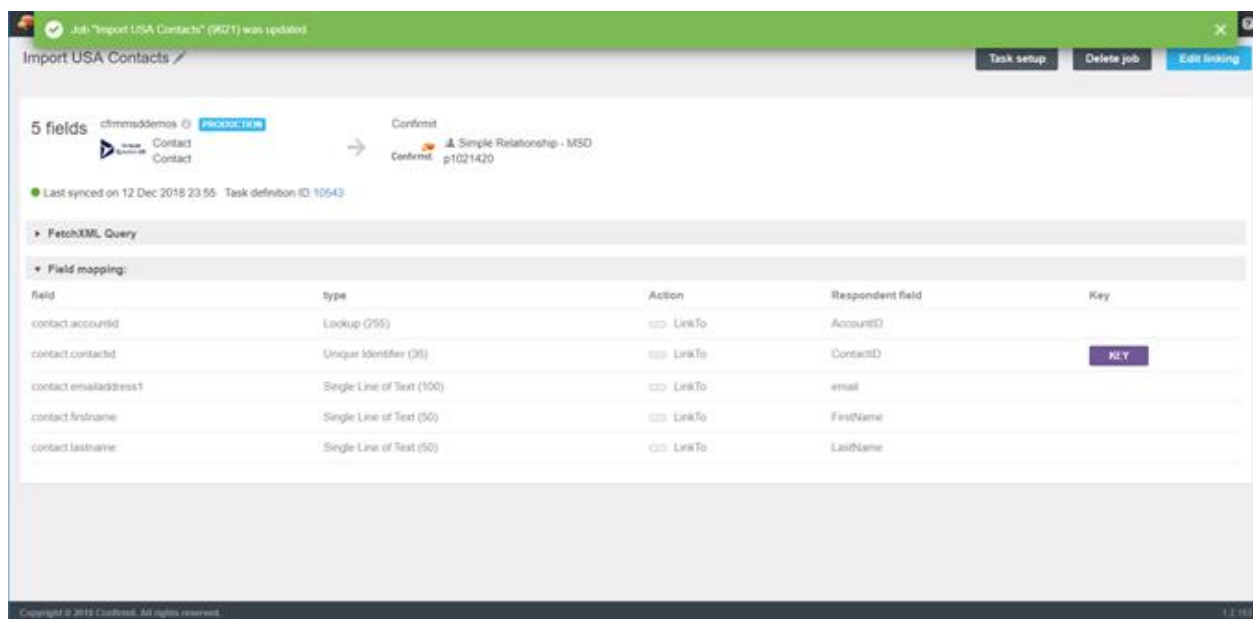


Figure 80 The Job Overview page

2.3. Transferring Data from Confirmit to MS Dynamics

Note: The CRM Connector for Microsoft Dynamics is a company add-on and is subject to payment. If your company has not licensed the add-on then the CRM Connector for Microsoft Dynamics link will not be visible on your home page. Refer to the Confirmit Acceptable Usage Policies (AUP) for further details. Only Chrome and Firefox browsers are currently supported.

CRM Connector for MS Dynamics enables you to setup and manage recurring jobs to export data from Confirmit to MS Dynamics through an easy-to-use wizard. You can choose whether to export completed survey response data or respondent table data. When exporting survey response data, you could for example export NPS score ratings and/or verbatim text responses into MS Dynamics. When exporting respondent table data, you could export e-mail delivery status information from survey invitations or export unique respondent-specific survey links. Subsequent MS Dynamics configuration can make the data visible to CRM users for reporting and analysis, or trigger actions to follow-up on interesting survey responses.

The interactive mode of CRM Connector for MS Dynamics requires two user logins:

1. Confirmit Horizons Professional Authoring login.
2. Microsoft Dynamics Administrative login.

Important

When the data transfer job has been established in the CRM Connector interactive mode, and subsequently runs in the recurring background mode, it will run under a special application user named "Confirmit CRM Connector App User". The security permissions and privileges of that user are managed inside Microsoft Dynamics by the Role: "Confirmit CRM Connector App User". The role and user are setup automatically the first time someone uses the wizard. However, it is important that the MS Dynamics admin makes sure this Role has the read and write permissions for the entities and fields in the CRM, or else CRM Connector will not work in the background mode.

Note: Your access to MS Dynamics data is controlled via the MS Dynamics user's settings inside MS Dynamics. If your MS Dynamics user is not a full administrative user and you are unable to see some MS Dynamics entities or fields inside CRM Connector, please review the MS Dynamics user role's permissions.

Important

Access to your MS Dynamics data is governed by MS Dynamics' Acceptable Usage Policies (AUP). To maintain optimum performance and ensure that the MS Dynamics API is available to all MS Dynamics customers, MS Dynamics imposes daily API usage limits. It is your responsibility to ensure that you do not exceed your MS Dynamics API usage limits. If you exceed the limits, it could temporarily disable CRM Connector as well as your other MS Dynamics integrations.

2.3.1. The Procedures

There are three main procedures for this feature:

- Set up a new data transfer job (see How to Set Up a New Data Transfer Job (Confirmit Survey Data to MS Dynamics) on page 75 for more information).
- Set up a new data transfer job (see How to Set Up a New Data Transfer Job (Confirmit Respondent to MS Dynamics) on page 82 for more information).
- Modify the field mapping of an existing data transfer job (see How to Modify an Existing Job Field Mapping (Confirmit to MS Dynamics) on page 87 for more information).

2.3.1.1. How to Set Up a New Data Transfer Job (Confirmit Survey Data to MS Dynamics)

The procedure for transferring data from the survey table to MS Dynamics is very similar to that for transferring data from the respondent table. There are however a few differences:

- Records only appear in the survey data table after the respondent has begun to take the survey. (They might or might not have completed it).
- Survey data includes the actual response information captured by the survey, and also background variable data or hidden variable data if that is used in your survey.
- Some system fields are accessed in the respondent table but not the survey data table (for example limited survey URLs, or e-mail delivery status).

Creating the job

1. In the **Create Job** menu in the upper-right corner of the Job List, select **Confirmit to Dynamics**.
2. Pick a name for your CRM Connector job
This should be a meaningful label that will help you to distinguish between this job and your other CRM Connector jobs.
3. Use the drop-down menu to select **Survey data** instead of Respondent table as your Confirmit data source.
By selecting Survey data, you will be transferring the answers your respondents have provided to your survey questions (for example NPS or other rating questions, open text answers, etc).
4. Select the Confirmit survey you wish to use as the source of the data for the transfer.
This is the survey data which will be sent from Confirmit to MS Dynamics. You can use the text search to find the survey if you have a large number of survey projects to choose from. Note that the survey must be launched for you to be able to select it.
Once you select the source survey, that survey's name and ID will appear across the top of the wizard underneath the title bar.

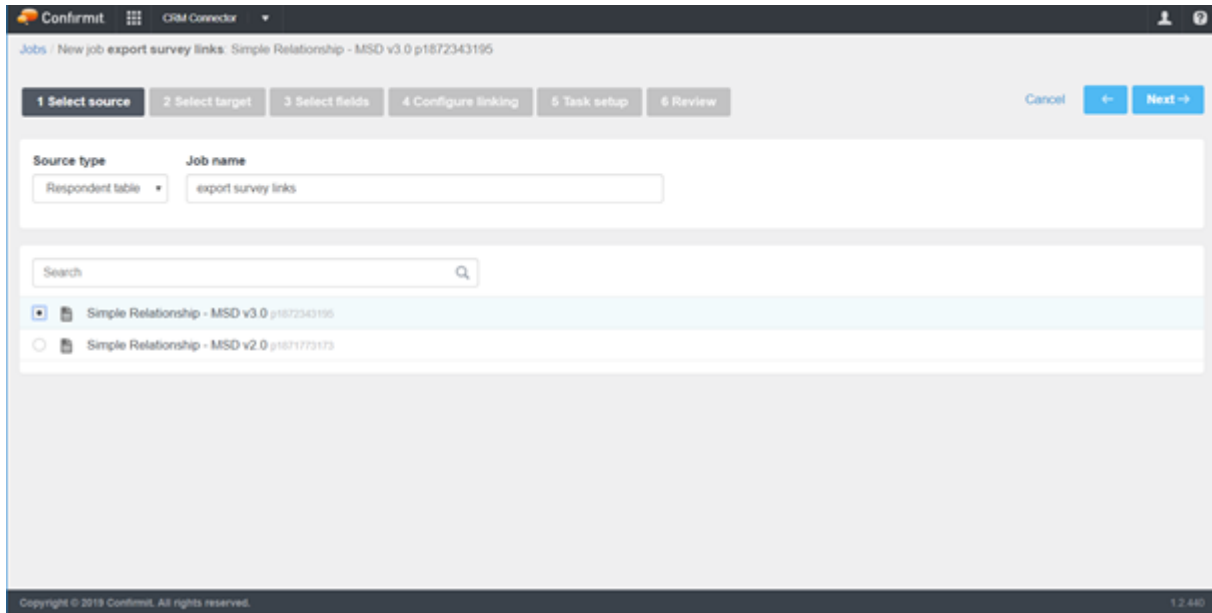


Figure 81 Selecting the source

5. Select the MS Dynamics target entity.

This is the entity (database table) within MS Dynamics where the Confirmit survey response data will be written. The entity must have been setup ahead of time by the MS Dynamics administrator. CRM Connector has certain requirements on the entity, in order for it to be compatible with the feature:

- o The entity name should include the string “Confirmit_”, so that it is clear it is intended for Confirmit data.
- o The custom entity should have a text alternate key field defined on the entity, so that CRM Connector can store the key value of ProjectID + Respondent ID into that field. That key allows us to uniquely identify the survey response, and maintain a robust mapping between Confirmit and the CRM. The alternate key must contain only one attribute (field) and be of type ‘Single Line of Text’ with a length of at least 100 characters.
- o In addition to those minimum requirements, the Dynamics administrator should add appropriate fields to the entity so that CRM Connector will have an appropriate set of fields within which the Confirmit data can be stored.
- o If the entity and fields and/or entity are newly created, ensure that you check that the “Confirmit CRM Connector App User” role has permission to read and write to the field(s).

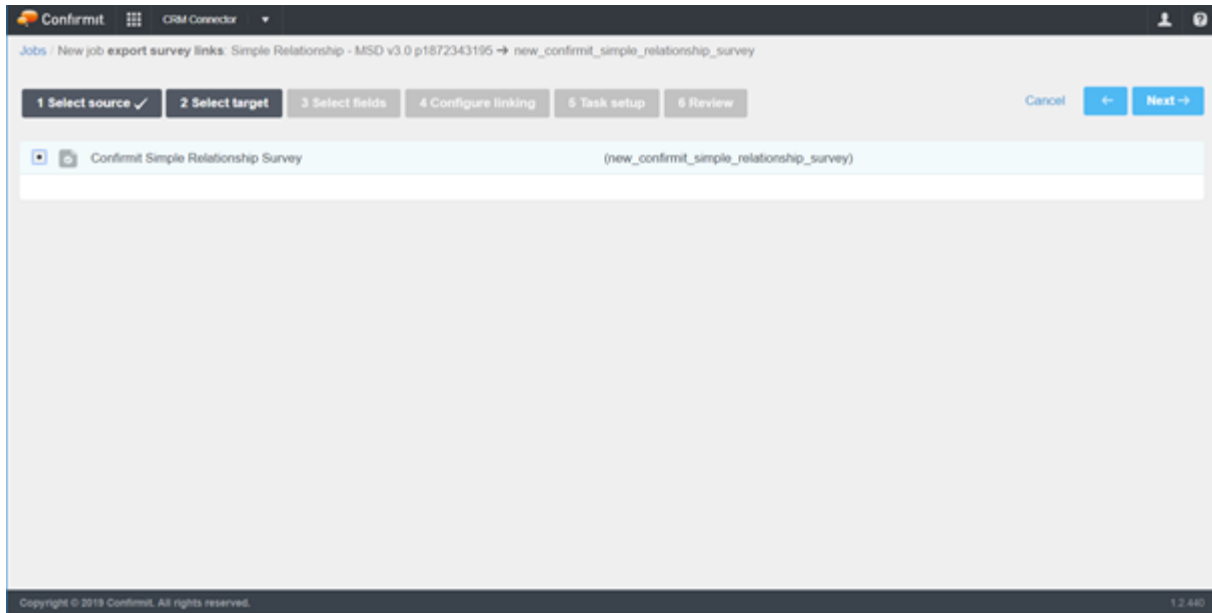


Figure 82 Selecting the target

6. Select the survey question data that you would like to transfer to MS Dynamics.

To do this, check the boxes next to the questions you wish to export. You could also use the Select All box to select or deselect all questions if you are managing a large number of questions in your survey.

The following types of Confirmit questions / variables are supported for export to MS Dynamics:

- ☐ Single
- ☐ Multi
- ☐ Opentext
- ☐ Numeric
- ☐ Date
- ☐ Grid

If you have an unsupported question type in your source survey, it will appear in the question list but it will be accompanied by a message stating that it cannot be mapped.

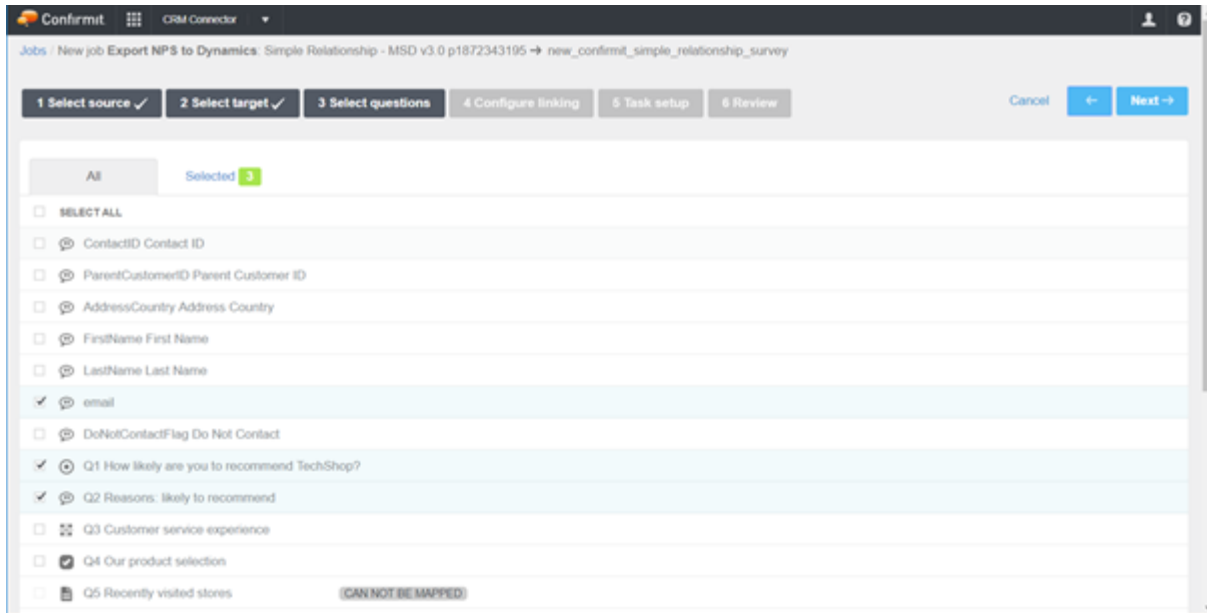


Figure 83 Selecting the questions

Loops are not supported. If your survey contains loops and you are having difficulty setting up a transfer of those questions, you can restructure the survey so that it does not use loops.

Note: For all data transfers, we will always include the Project ID and the Respondent ID as a record key. These two variables are concatenated together to form a composite key that uniquely identifies a survey response.

Before proceeding to the next step you can use the “Selected” tab to review which survey questions you have selected to transfer.

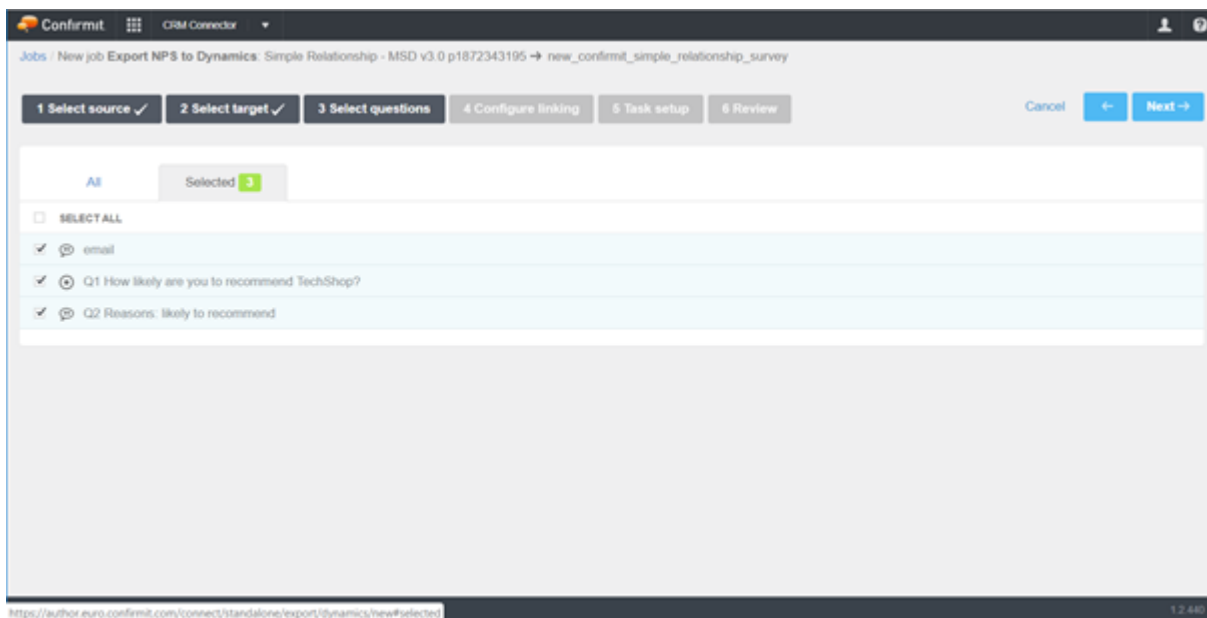


Figure 84 Reviewing your selections

7. (Optional) Filter records from export to MS Dynamics.

If you created a Text question in your survey called NO_CRM_CONNECTOR_EXPORT then this special question can be used to exclude records from export to MS Dynamics. If you set the response for this question to '1' (either programmatically via in-survey scripting, or manually via the interactive survey response data editor) then that response will be skipped and not be transferred to MS Dynamics. The question can be set as hidden in Survey Designer so that respondents won't see it.

No action is needed to enable the question if it is present. CRM Connector will automatically see it. If any records have been excluded because of NO_CRM_CONNECTOR_EXPORT, then it is noted in the task log (see How to View the History of an Existing Job on page 90 for more information).

8. Select whether you want to transfer answer codes or answer labels.

For single and grid questions, you have the choice of sending either answer codes or answer labels to MS Dynamics. Inside MS Dynamics your business users may better understand the text labels, however, numeric codes may be more helpful if you want to do any calculations inside MS Dynamics with the data. This setting applies to all single and grid questions in the transfer.

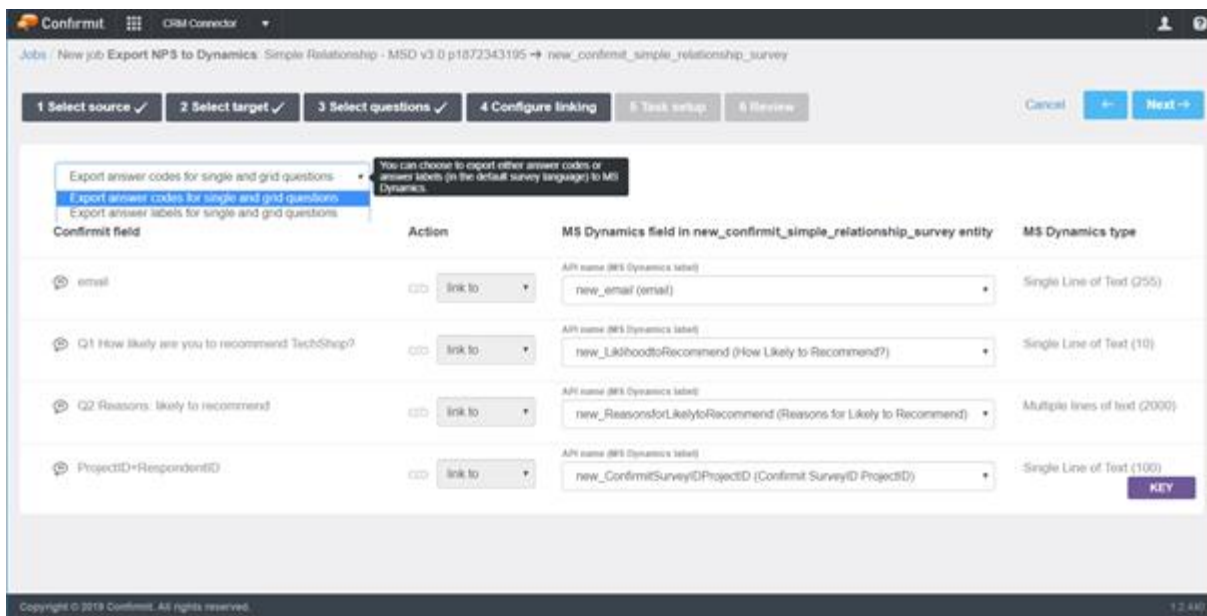


Figure 85 Selecting answer codes or answer labels

9. Configure the linking between Horizons and MS Dynamics fields.

Here you define how to link the Horizons data fields to MS Dynamics data fields on the custom object.

Note that only valid mappings between the platforms will be visible (for example text survey data types can link to text MS Dynamics data types). Note also that you cannot create new MS Dynamics fields from inside CRM Connector. If you want new or different fields then the MS Dynamics administrator must adjust the entity configuration inside MS Dynamics.

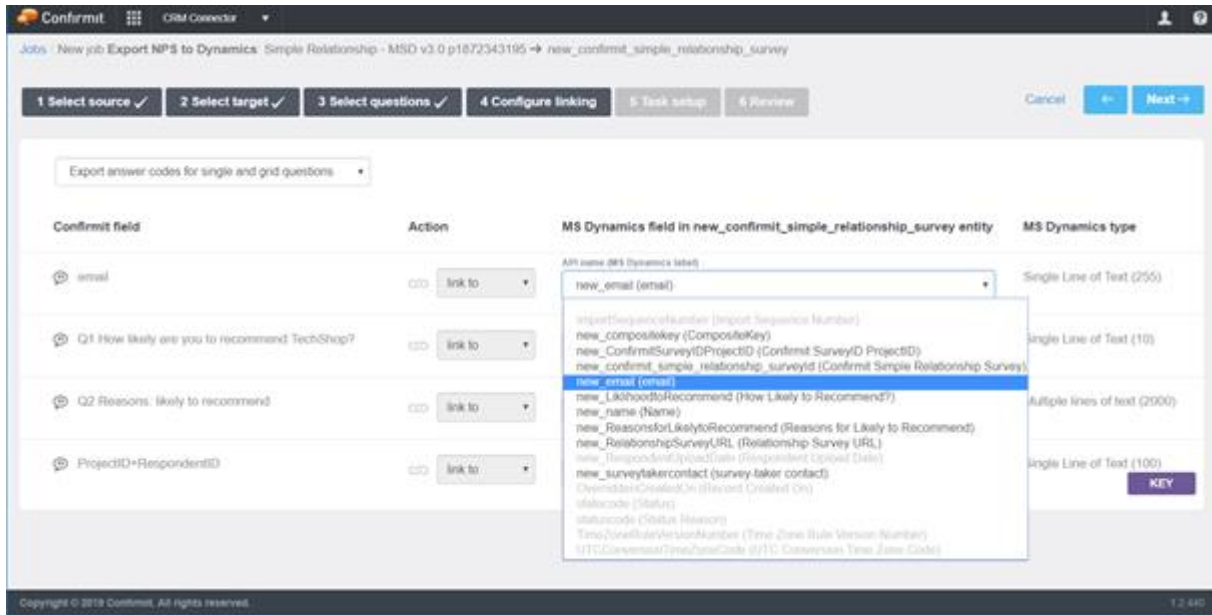


Figure 86 Configuring the linking

Setting up the task

Each job creates a data processing task within the Confirmit environment to execute the data transfer.

1. Define when the data should transfer:
 - o **Off** (Sync manually) - the task will be setup and saved but will not actually run. Use this when you want to setup a mapping, but don't plan to start running the task until later.
 - o **Scheduled** - you may choose to run the job hourly, daily, weekly, monthly, or one time only. Select the data and time when the job is to run.
2. Define the survey response data filter options:
 - o **Data to be included** - for recurring data transfers you will normally only want to transfer new and changed records. However, in some cases you will want to transfer all survey data, so that is a choice.
 - o **Interview status filter** - decide whether to include only completed surveys ('Completed'), or to include all surveys ('All') which will transfer data for surveys that, for example were started and some questions were answered, but the survey has not been completely answered.

3. Advanced Settings

These settings can typically be left unchanged, however they are discussed in this guide (see How to Modify an Existing Job Field Mapping (Confirmit to MS Dynamics) on page 87 for more information).

Task setup

☐ Off (Sync manually)
☒ Scheduled

Frequency

Synchronize: Daily every 1 day(s)

Schedule

Start: 7 Mar 17:00 End: 7 Jun 2019

Data to be included

☒ All
☐ New and changed records

Interview status filter

☒ All
☐ Completed

Figure 87 Setting up the task

Reviewing and completing the setup

Before saving the job, review the job information. Check that the job will run when expected, review the selected questions, the associated action, and which fields will contain the data in MS Dynamics.

Click **Complete setup** to save your changes.

Task Setup

Scheduled: **Daily** Start: 8 Mar 2019 17:00 End: 7 Jun 2019
 Syncs every day at 17:00.

Confirmit field	Action	MS Dynamics API name	MS Dynamics type
email	Link to	new_email	Single Line of Text (255)
Q1	Link to	new_LikelihoodtoRecommend	Single Line of Text (10)
Q2	Link to	new_ReasonsforLikelytoRecommend	Multiple lines of text (2000)
ProjectID+RespondentID	Link to	new_ConfirmitSurveyIDProjectID	Single Line of Text (100) KEY

Figure 88 Completing the setup

2.3.1.2. How to Set Up a New Data Transfer Job (Confirmit Respondent to MS Dynamics)

The procedure for transferring data from the respondent table to MS Dynamics is very similar to transferring data from the survey response table. There are however a few differences:

- The respondent table is a list of possible survey respondents. There is no guarantee they have taken the survey, or even been invited to take the survey.
- There are no compound question types in the respondent table, just single data fields.
- The respondent table contains a range of useful system fields associated with each respondent, such as the status of attempted e-mail deliveries, and the specific survey URL associated with that respondent. In some integration scenarios it is useful to transfer this data into MS Dynamics to centrally manage user engagement and/or use a bulk e-mail delivery tool integrated with MS Dynamics (for example Marketing Cloud).

Creating the job

1. In the **Create Job** menu in the upper-right corner of the Job List, select **Confirmit to Dynamics**.
2. Pick a name for your CRM Connector job.
This should be a meaningful label that will help you distinguish between this job and your other CRM Connector jobs.
3. Use the drop-down menu to select **Respondent table** instead of Survey data as your Confirmit data source.

By selecting Respondent table, it means you will be transferring information about the potential survey respondents and the associated system information. You will not be transferring actual captured survey response data.

4. Select the particular Confirmit survey you wish to use as the source of the data for the transfer.

This is the survey project's data which will be sent from Confirmit to MS Dynamics. You can use the text search to find the survey if you have a large number of survey projects to choose from. Note that the survey must be launched for you to be able to select it.

Once you select the source survey, that survey's name and ID will appear across the top of the wizard underneath the title bar.

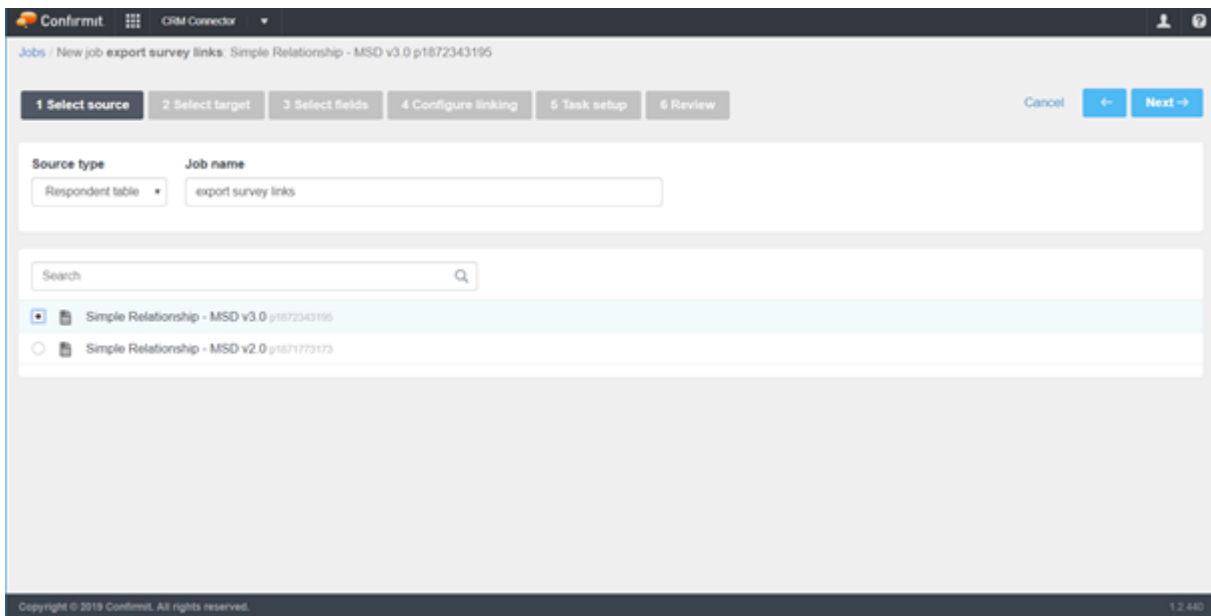


Figure 89 Selecting the source

5. Select the MS Dynamics target entity.

This is the entity (database table) within MS Dynamics where the Confirmit survey respondent data will be written. The entity must have been setup ahead of time by the MS Dynamics administrator. CRM Connector has certain requirements on the entity, in order for it to be compatible with the feature:

- o The entity name should include the string “Confirmit_”, so that it is clear it is intended for Confirmit data
- o The custom entity should have a text alternate key field defined on the entity, so that CRM Connector can store key value of ProjectID + Respondent ID into that field. That key allows us uniquely identify the survey response, and maintain a robust mapping between Confirmit and the CRM. The alternate key must contain only one attribute (field) and be of type 'Single Line of Text' with a length of at least 100
- o In addition to those minimum requirements, the Dynamics admin should add appropriate fields to the entity so that CRM Connector will have an appropriate set of fields within which the Confirmit data can be stored.
- o If the entity and fields and/or entity are newly created, make sure to check that the “Confirmit CRM Connector App User” role has permission to read and write to the field(s).

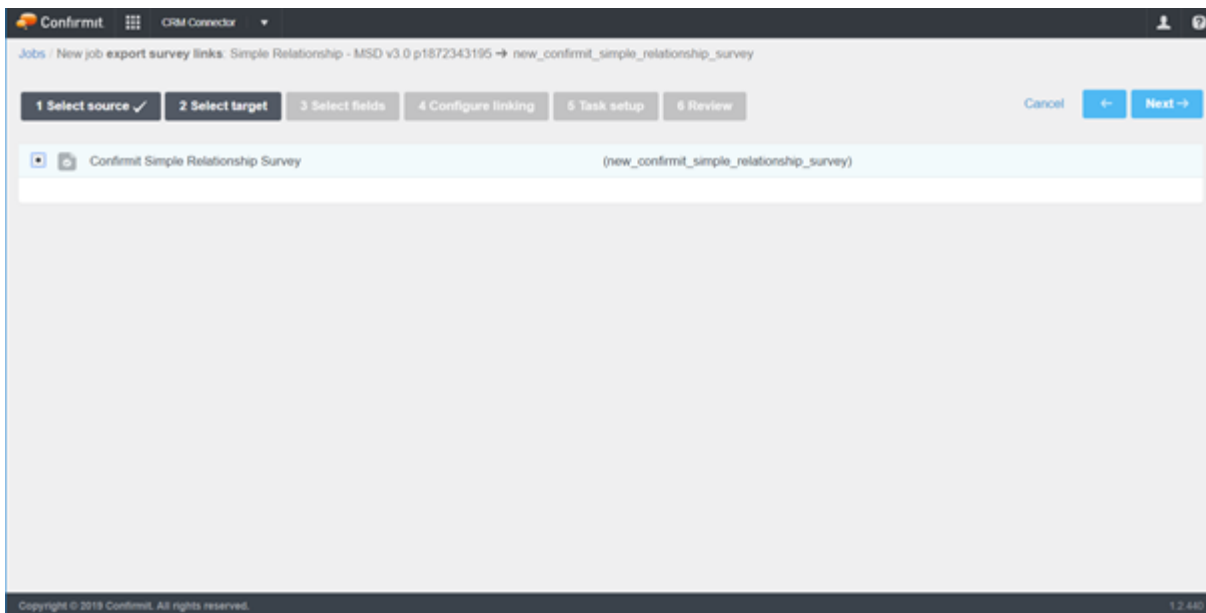


Figure 90 Selecting the target

5. Select the respondent table fields that you would like to transfer to MS Dynamics.

To do this, check the boxes next to the fields you wish to export. You could also use the Select All box to select or deselect all fields if you are managing a large number of fields in your survey.

If you have created custom variables in your survey from importing CRM data (for example via manual upload, SFTP upload, or by importing data from MS Dynamics using CRM Connector for MS Dynamics) you will see those fields listed here, and you have the option to transfer that data to MS Dynamics. One import reason to include these fields is if they are MS Dynamics reference IDs. In that scenario, these fields can be useful to link the respondent record back to other entities within MS Dynamics.

☐	☐	FilterStatusDate	Time when the respondent's e-mail address was blocked by Contact Frequency Rules
☐	☐	FirstEmailedDate	Time when the respondent was first sent an e-mail
☐	☐	FirstName	
☐	☐	LastName	
☐	☐	LastUpdated	Time when the respondent record was last updated
☐	#	noOfEmailsSent	Number of emails sent to the respondent e-mail address
☐	#	OptOut	Respondent email opt out code (part of e-mail opt-out Flex extension)
☐	☐	OptOutDate	Time when respondent opted out (part of e-mail opt-out Flex extension)
☐	☐	ParentCustomerID	
☐	☐	ProjectID	Survey ID
☐	#	respId	Respondent ID (unique for the respondent record)
☐	☐	smtpCode	Response code from the recipient's e-mail server
☐	☐	smtpStatus	Status of most recent sendout for a specific e-mail address
☐	☐	smtpStatusDate	Time of the latest smtp status value
☐	#	smtpTaskId	Task id of the batch email task which sent the most recent e-mail to the respondent e-mail address
☒	☐	SurveyLink	Survey link URL
☐	☐	userId	Respondent's userId for limited surveys
☐	☐	username	Special username used by the external respondent feature

Figure 91 Selecting the fields

System fields have a description to the right to make their meaning clearer. The system fields are used by a variety of different parts of the Confirmit platform: the e-mailing module, the e-mail opt-out feature, the CATI module, Contact frequency rule manager, etc.

Note: For all data transfers, we will always include the Project ID and the Respondent ID. These two variables are concatenated together to form a composite key that uniquely identifies a survey response.

Before proceeding to the next step you can use the “Selected” tab to review which survey questions you have selected to transfer.

The screenshot shows the '3 Select fields' step in the Confirmit CRM Connector workflow. The progress bar at the top indicates the current step. Below the progress bar, there are tabs for 'All' and 'Selected'. The 'Selected' tab is active, showing a list of fields with checkboxes and descriptions. The fields are: email, noOfEmailsSent, OptOut, OptOutDate, and SurveyLink. Each field has a checkbox that is checked. The descriptions are: email, Number of emails sent to the respondent e-mail address, Respondent email opt out code (part of e-mail opt-out Flex extension), Time when respondent opted out (part of e-mail opt-out Flex extension), and Survey link URL.

Figure 92 Reviewing your selections

6. (Optional) Filter records from export to MS Dynamics.

If you created a field in the respondent table called NO_CRM_CONNECTOR_EXPORT then this special field can be used to exclude records from export to MS Dynamics. If you set the value of this field to '1' then that respondent record will not be exported.

7. Configure the linking between Horizons and MS Dynamics fields.

Define how to link the Horizons data fields to MS Dynamics data fields on the custom entity.

Only valid mappings between the platforms will be visible (eg text survey data types can link to text MS Dynamics data types. You cannot create new MS Dynamics fields from inside CRM Connector. If you want new or different fields, then the MS Dynamics administrator should adjust the entity configuration inside MS Dynamics.

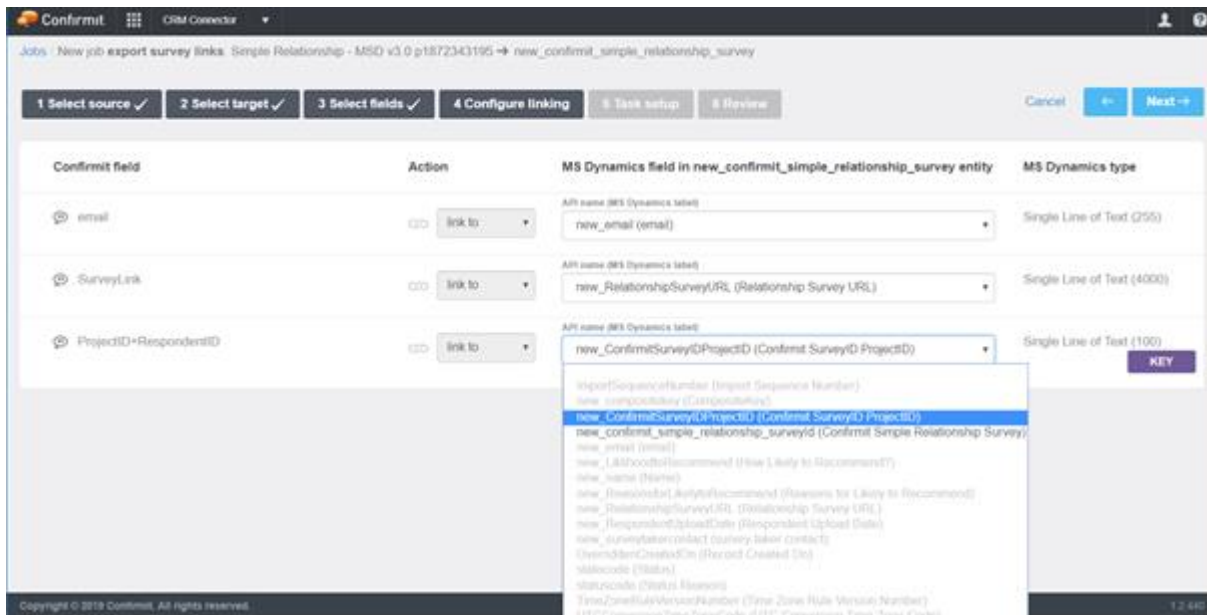


Figure 93 Configuring the linking

Setting up the task

Each job creates a data processing task within the Confirmit environment to execute the data transfer.

1. Define when the data should transfer:

- o Off (Sync manually) - the task will be setup and saved but will not actually run. Use this when you plan to start running the task later.
- o Scheduled - you may choose to run the job hourly, daily, weekly, monthly, or one time only. Select the data and time when the job is to run.

2. Define the respondent data filter options:

- o Data to be included - for recurring data transfers you will normally only want to transfer new and changed records. However, in some cases you will want to transfer all historical data, too, so that is a choice.

3. Advanced Settings

- o These settings can typically be left unchanged, however they are discussed in this guide (see How to Modify an Existing Job Field Mapping (Confirmit to MS Dynamics) on page 87 for more information).

Figure 94 Setting up the task

Reviewing and completing the setup

Before saving the job, review the job information. Check that the job will run when expected, review the selected fields, and the mapping into MS Dynamics.

Click **Complete setup** to save your changes.

Confirmit field	Action	MS Dynamics API name	MS Dynamics type
email	Link to	new_email	Single Line of Text (255)
SurveyLink	Link to	new_RelationshipSurveyURL	Single Line of Text (4000)
ProjectID+RespondentID	Link to	new_ConfirmitSurveyIDProjectID	Single Line of Text (100)

Figure 95 Completing the setup

2.3.1.3. How to Modify an Existing Job Field Mapping (Confirmit to MS Dynamics)

After setting up a transfer job, you may decide that you need to change the selected questions or field linking. The procedure is largely the same regardless of whether you are transferring data into MS Dynamics from the respondent table or from the survey response table. As the two workflows are so similar we will illustrate the procedure using the feature to export from survey response data as the example, however the process is the same if you are modifying a job to export respondent table data.

1. To edit an existing job, select **Edit Linking** from the Actions drop-down for that job..

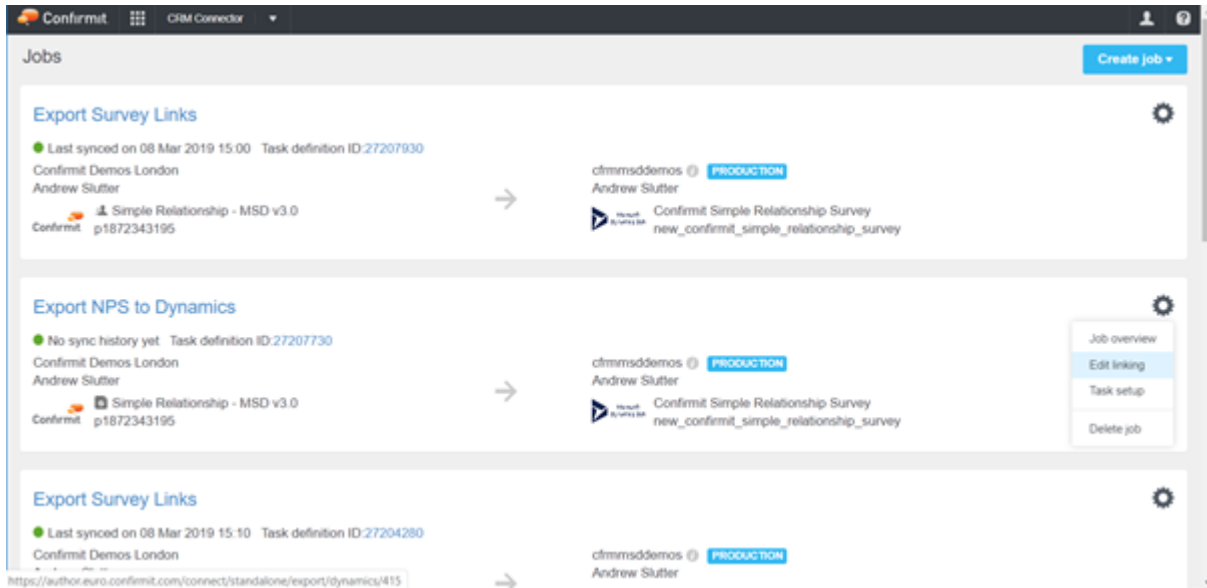


Figure 96 Editing an existing job

2. Make any changes necessary to the question / field mapping.
Select and deselect the check boxes next to the Confirmit survey questions / respondent fields to add or remove them from the data transfer job. Questions / fields that are currently mapped will already be checked.

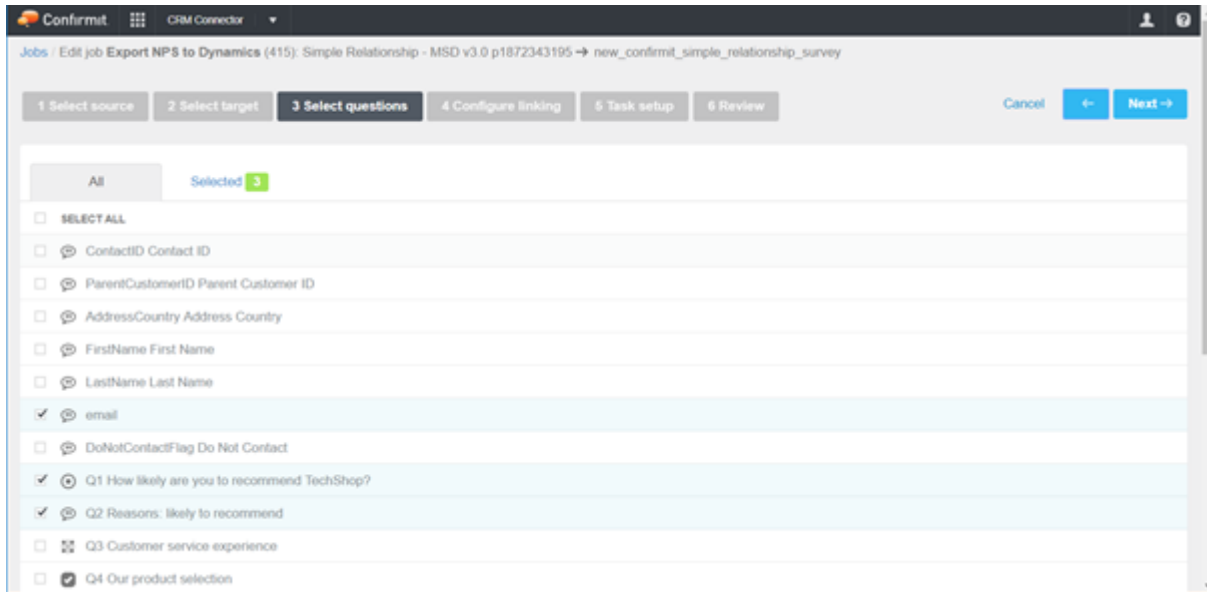


Figure 97 Editing the question mapping

3. Update the field linking

Make any required changes to the field linking and/or create new fields on the MS Dynamics custom object.

Important

The menu of available MS Dynamics fields for linking will only show valid field linkings. Fields where the MS Dynamics data type cannot be linked to a Horizons data type will be visible but grayed out in the menu. MS Dynamics fields that cannot be updated through the MS Dynamics API will not appear in the menu list.

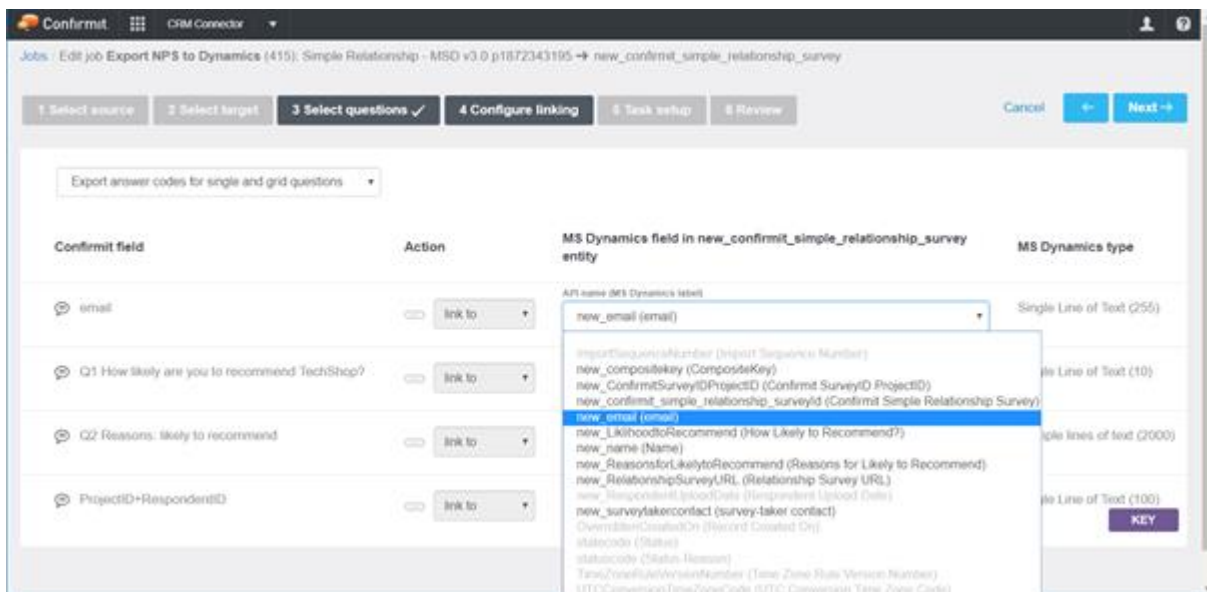


Figure 98 Configuring the linking

4. Make any changes as needed to the Task setup

(Optional) Advanced Settings.

You can control the API upload batch size here. This is a debugging feature. CRM Connector for MS Dynamics exports survey response data or respondent data into MS Dynamics in batches of 900 records. If the process fails because of invalid data stored in Confirmit, MS Dynamics may reject an entire group of survey records. This feature is helpful in that scenario because you can temporarily set the batch size to 1 and load the records into MS Dynamics one at a time to more easily see which specific records have the data problem. It is best practice to leave this at the normal default setting except when debugging to reduce the number of API calls made to MS Dynamics.

Off (Sync manually)
☒ Scheduled

Frequency
 Synchronize: Daily every 1 day(s)

Schedule
 Start: 8 Mar 2019 18:00 End: 7 Jun 2019
 Syncs every day at 18:00.

Data to be included
☒ All
☐ New and changed records

Interview status filter
☒ All
☐ Completed

Advanced Settings
 MS Dynamics bulk upload batch size
 900

Figure 99 Advanced Settings for Task setup

- Review and accept the changes to your job.
 When you save the changes, you will be taken to the Job Overview page.

Job "Export NPS to Dynamics" (415) was updated.

Export NPS to Dynamics Task setup Delete job Edit linking

4 fields Confirmit Demos London
 Simple Relationship - MSD v3.0
 Confirmit p1872343195 → cfrmsdemos PRODUCTION
 Confirmit Simple Relationship Survey
 new_confirmit_simple_relationship_survey

No sync history yet Task definition ID: 27207730

Confirmit field	Action	MS Dynamics API name	MS Dynamics type
email	Link to	new_email	Single Line of Text (255)
Q1	Link to	new_LikelihoodtoRecommend	Single Line of Text (10)
Q2	Link to	new_ReasonsforLikelytoRecommend	Multiple lines of text (2000)
ProjectID+RespondentID	Link to	new_ConfirmitSurveyIDProjectID	Single Line of Text (100) KEY

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Figure 100 The Job Overview page

3. Managing CRM Connector Jobs

The procedures discussed in this section are the same for all CRM Connector jobs, regardless of the direction of data transfer (to or from Confirmit) or the supported CRM (Salesforce or MS Dynamics).

3.1. The Procedures

There are four main procedures to manage your CRM Connector jobs:

- View the logs of an existing data transfer job (see How to View the History of an Existing Job on page 90 for more information).
- Modify the schedule of an existing data transfer job (see How to Modify an Existing Job Schedule on page 93 for more information).
- Delete a job (see How to Delete a Job on page 94 for more information).
- Rename an existing data transfer job (see How to Change the Name of an Existing Job on page 95 for more information).

3.1.1. How to View the History of an Existing Job

After you have submitted a job, you may want to see the logs that were created by the task. One place to do that is via the task management user interface in the Professional Authoring UI. However, it is often easier to use direct links from the Job List to see the logs for a particular job.

1. In the Job List, click on the task definition ID (it is a blue integer number).

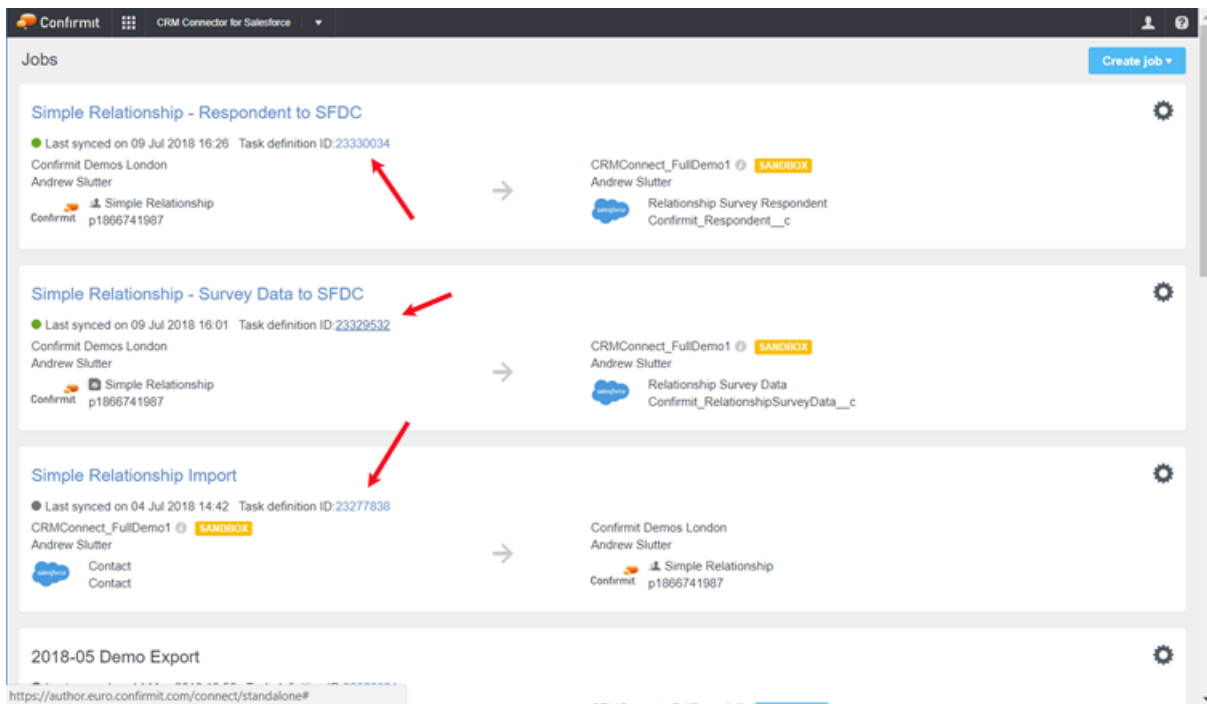


Figure 101 Selecting the task definition ID from the Job View list

The task definition associated with the job opens.

The screenshot shows the 'CRM Connector task' window with the 'Definition' tab selected. The window has a blue header with the Confirmit logo and a 'Close' button. Below the header, there are four tabs: 'Definition', 'Recurrence', 'Parameters', and 'Instances'. The 'Definition' tab is active, displaying a form with the following fields:

- Task Type:** CRM Connector task
- ID:** 23330034
- Owner:** andrews_demo
- Created By:** andrews_demo
- Company:** Confirmit Demos London
- Project ID:** p1866741987
- Comment:** Salesforce Sync
- Command Line:** (empty text area)
- Notify:** Add emails to notify (empty text area)
- When task is:**
 - ☐ Aborted
 - ☐ Final recurring task completed
 - ☐ Successful

At the bottom of the form, there are two buttons: 'Save' and 'Run task'.

Figure 102 The Task Definition page for the job

2. Select the 'Instances' tab to view the logs from specific tasks that are scheduled or have been run.

The screenshot shows the 'CRM Connector task' window with the 'Instances' tab selected. The window has a blue header with the Confirmit logo and a 'Close' button. Below the header, there are four tabs: 'Definition', 'Recurrence', 'Parameters', and 'Instances'. The 'Instances' tab is active, displaying a list of task instances and a detailed view of a specific instance.

Task Instances:

- 7/9/2018 5:00:00 PM UTC +1:00 In Queue
- 7/9/2018 4:24:30 PM UTC +1:00 Complete

CRM Connector task Details:

- Task progress is updated every 5 seconds
- Task Id: 174084672
- Status: Queue
- Assigned server: -
- Schedule: 7/9/2018 5:00:00 PM UTC +1:00
- Start Time: -
- End Time: -
- Elapsed Time: 00:00:00

A progress bar is shown at the top of the details section, ranging from 0% to 100%.

Figure 103 The Instances tab

- Click on a task instance listed on the left side of the window to review the logs of tasks that have completed or failed. These logs have important information for jobs to understand the cause of a failure. The task logs look different for different types of CRM Connector jobs.

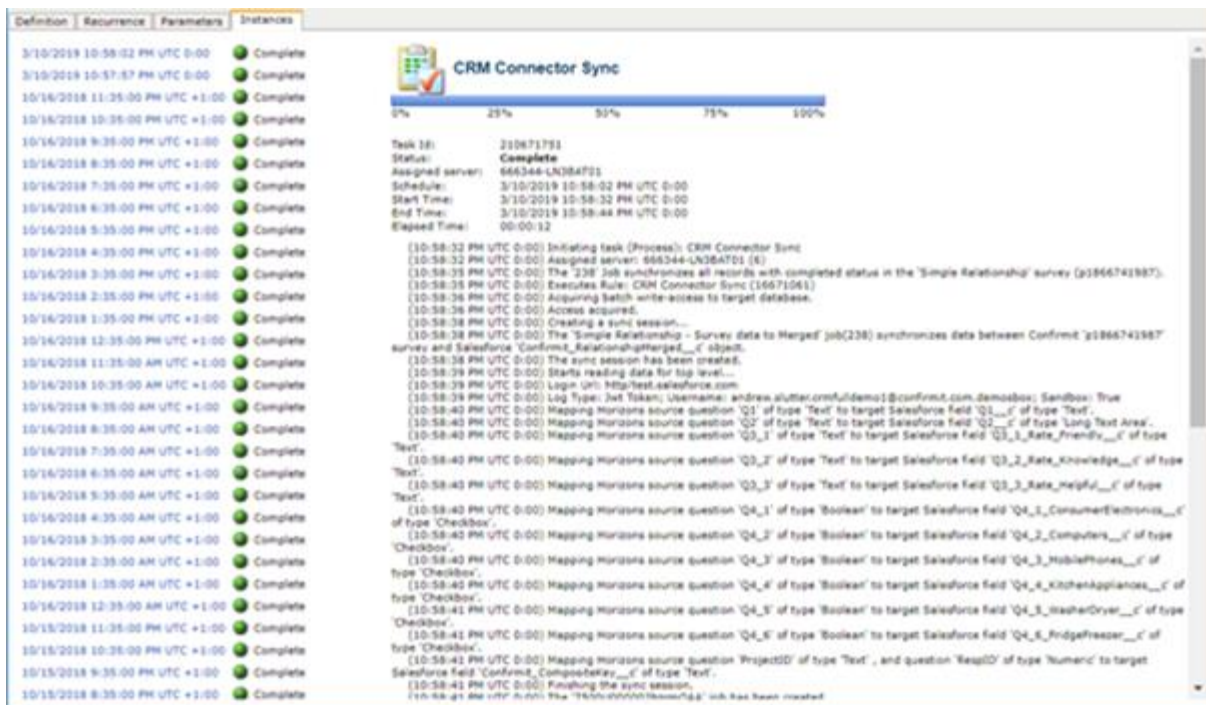


Figure 104 Example of a task log (Confirmit Survey Data to Salesforce) on the Instances Tab

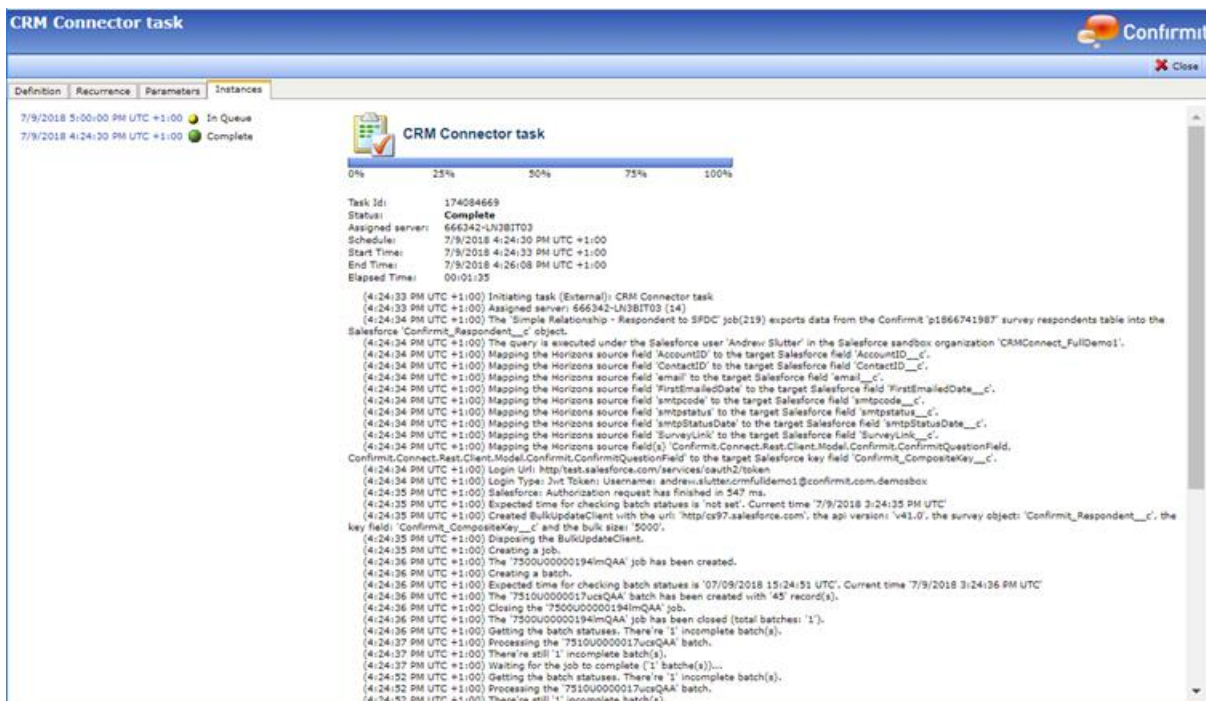


Figure 105 Example of a task log (Confirmit Respondent Table to Salesforce) on the Instances Tab

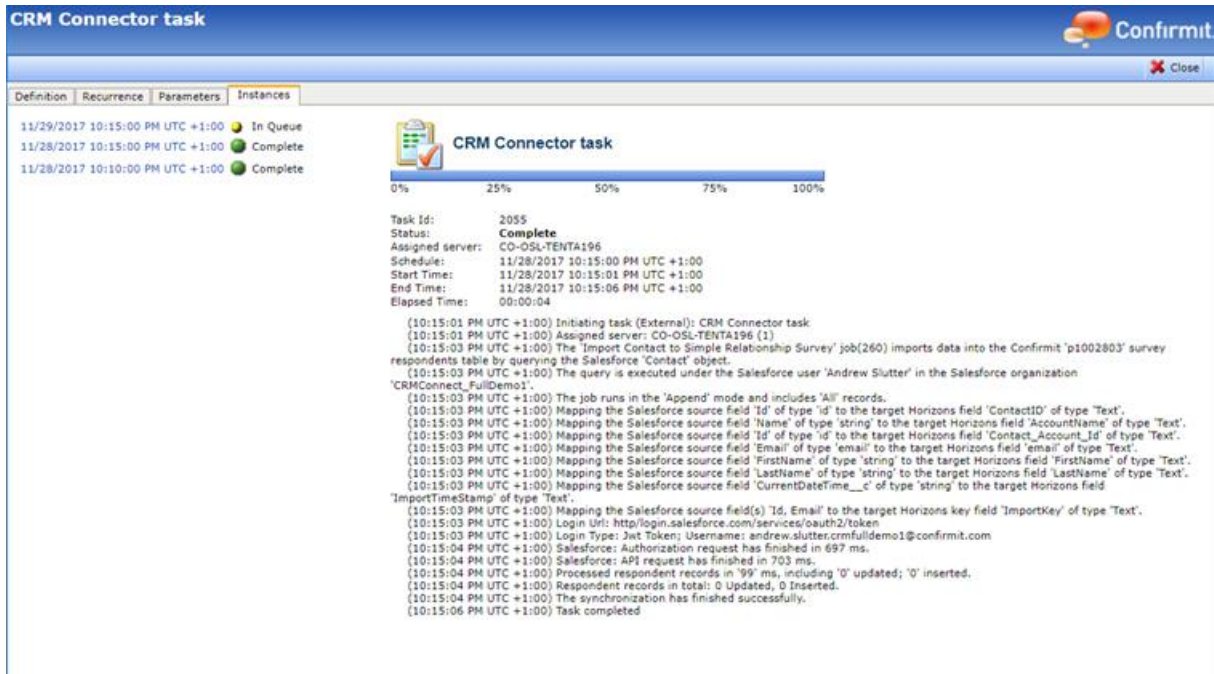


Figure 106 Example of a task log (Salesforce to Confirmit Respondent Table) on the Instances Tab

3.1.2. How to Modify an Existing Job Schedule

After setting up a transfer job, you may decide that you need to change when you want the transfer to run.

1. To edit an existing job, select **Task Setup** from the **Actions** drop-down for that job on the Job List page.

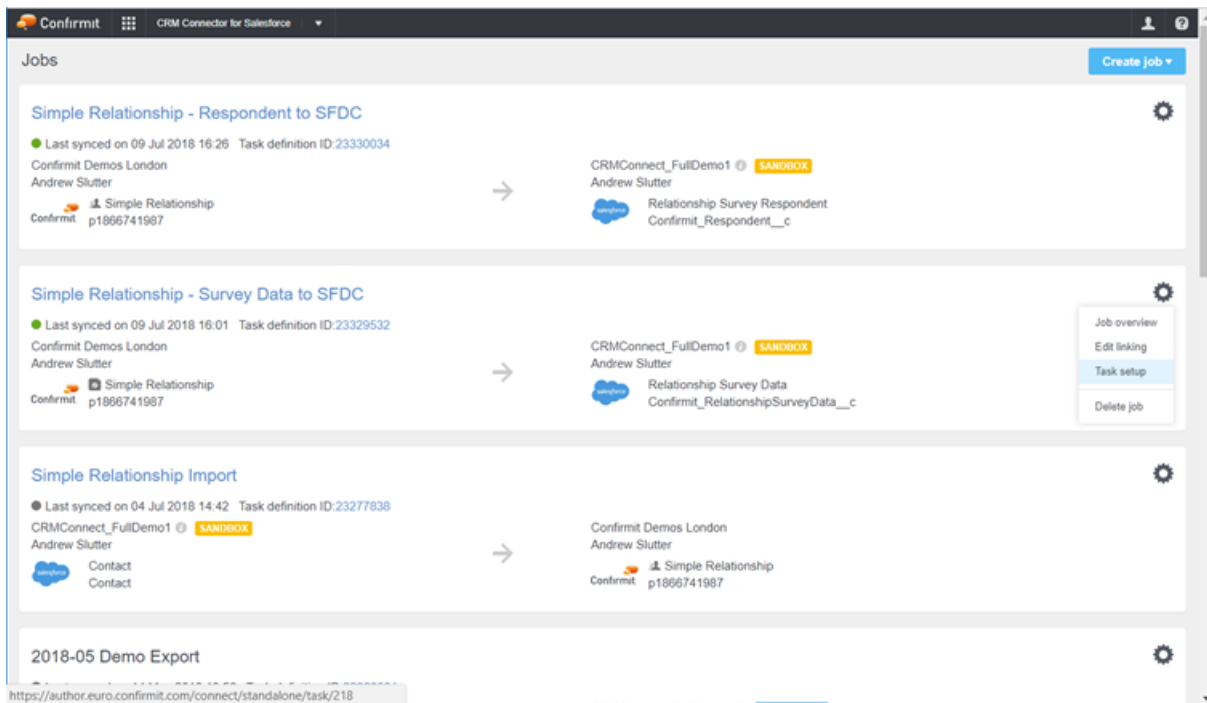


Figure 107 Editing an existing job schedule from the Job List view

2. Make any changes necessary to the task setup.

The screenshot displays the 'Task setup' configuration page within the Confirmit CRM Connector for Salesforce. The page title is 'Simple Relationship - Survey Data to SFDC / Task setup'. The 'Task setup' section is active, showing two options: 'Off (Sync manually)' and 'Scheduled'. The 'Scheduled' option is selected. Under the 'Scheduled' option, the 'Frequency' is set to 'Hourly' with a dropdown menu showing 'Hourly', 'Daily', 'Weekly', 'Monthly', and 'One-time only'. The 'Synchronize' dropdown is also set to 'Hourly'. The frequency is 'every 1 hour(s)'. The 'Schedule' section shows a 'Start' date of '9 Jul 2018' and an 'End' date of '9 Oct 2018'. A 'Save settings' button is located in the top right corner. The footer contains the text 'Copyright © 2018 Confirmit. All rights reserved.' and the version number '1.1.2041'.

Figure 108 Updating the task setup

3. Review the information.
4. Click **Save settings** to save your changes.

3.1.3. How to Delete a Job

To delete a job:

1. Select **Delete job** from the **Actions** drop-down for the relevant job on the Job List page.

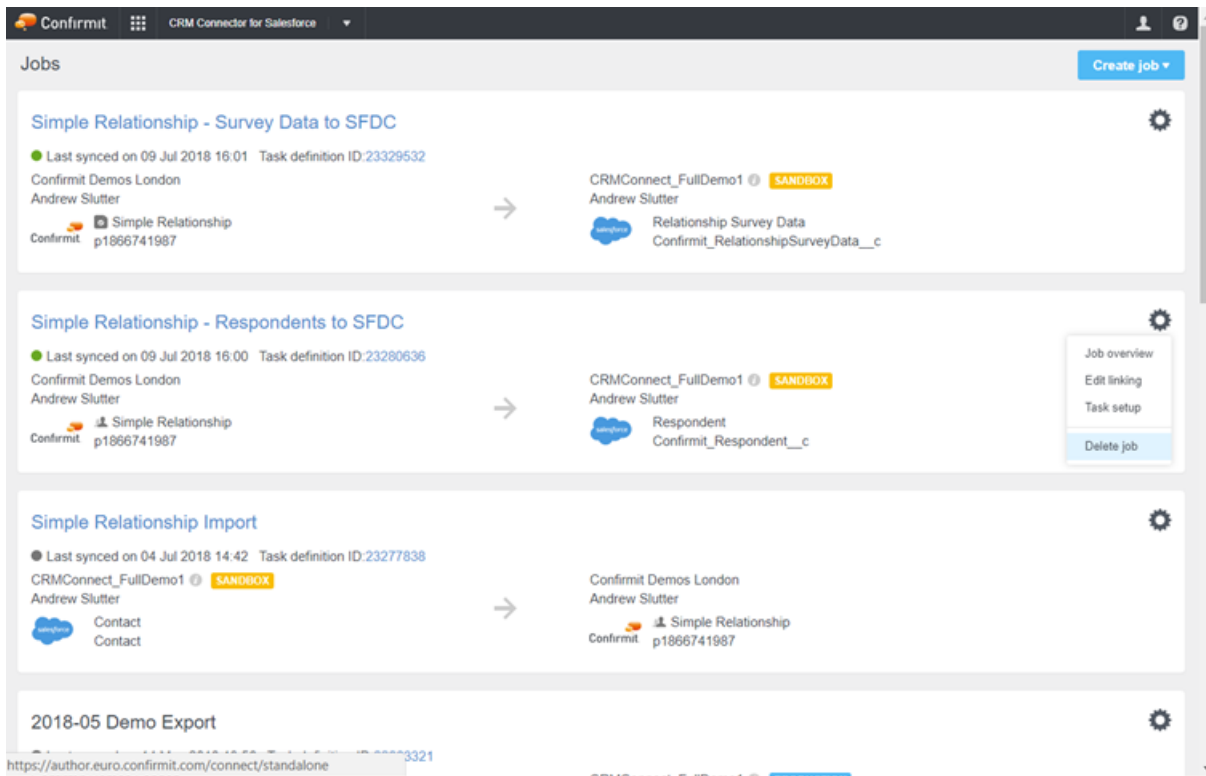


Figure 109 Deleting a job

A confirmation overlay opens.

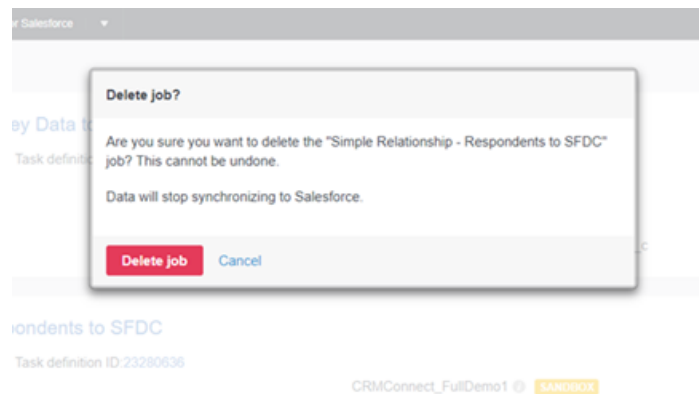


Figure 110 The Delete Job confirmation overlay

2. Click the **Delete job** button to confirm the deletion.

The job information will be deleted, future data synchronization and future synchronization will be canceled. Note that this will not delete the custom survey object in Salesforce, or data that has been imported or exported in the past. If you wish to delete that data, this must be done via the Salesforce platform or the Horizons platform.

3.1.4. How to Change the Name of an Existing Job

To rename a job:

1. Select **Job overview** from the **Actions** drop-down for the relevant job on the Job List.

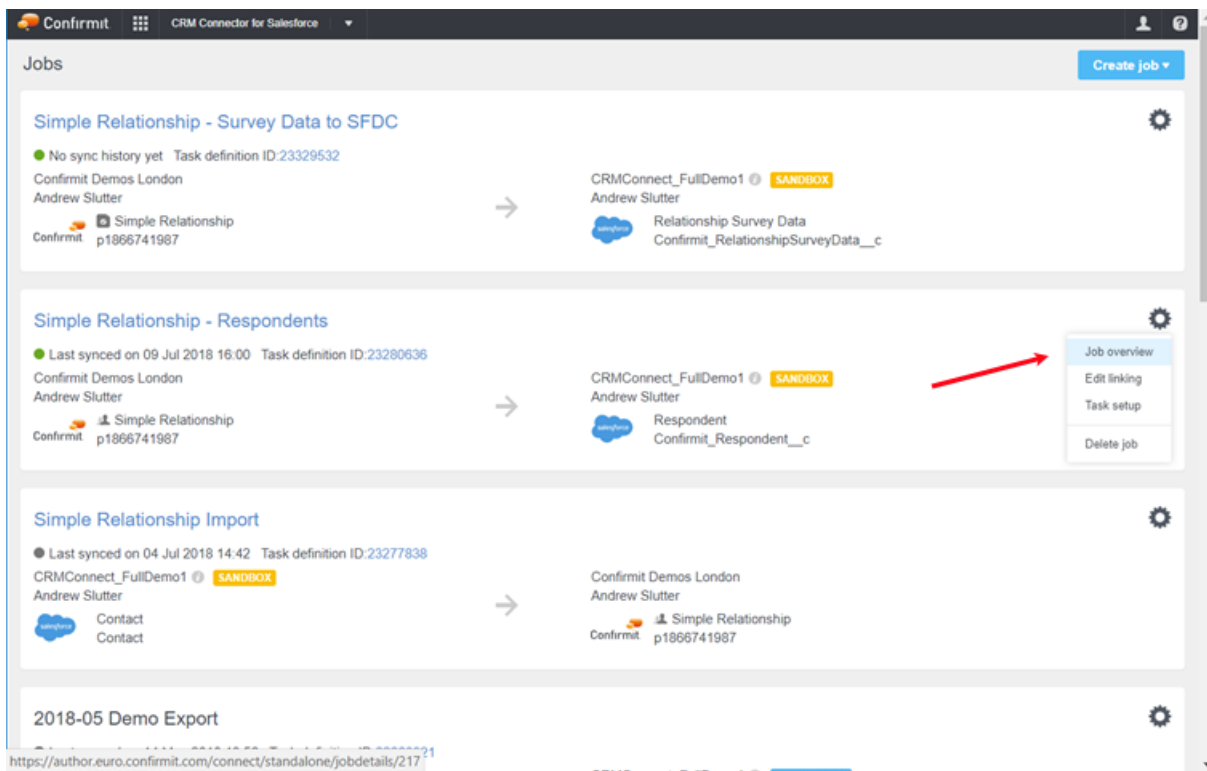


Figure 111 Selecting Job Overview from the job list view

2. Click on the pen icon in the upper-left corner and update the title.

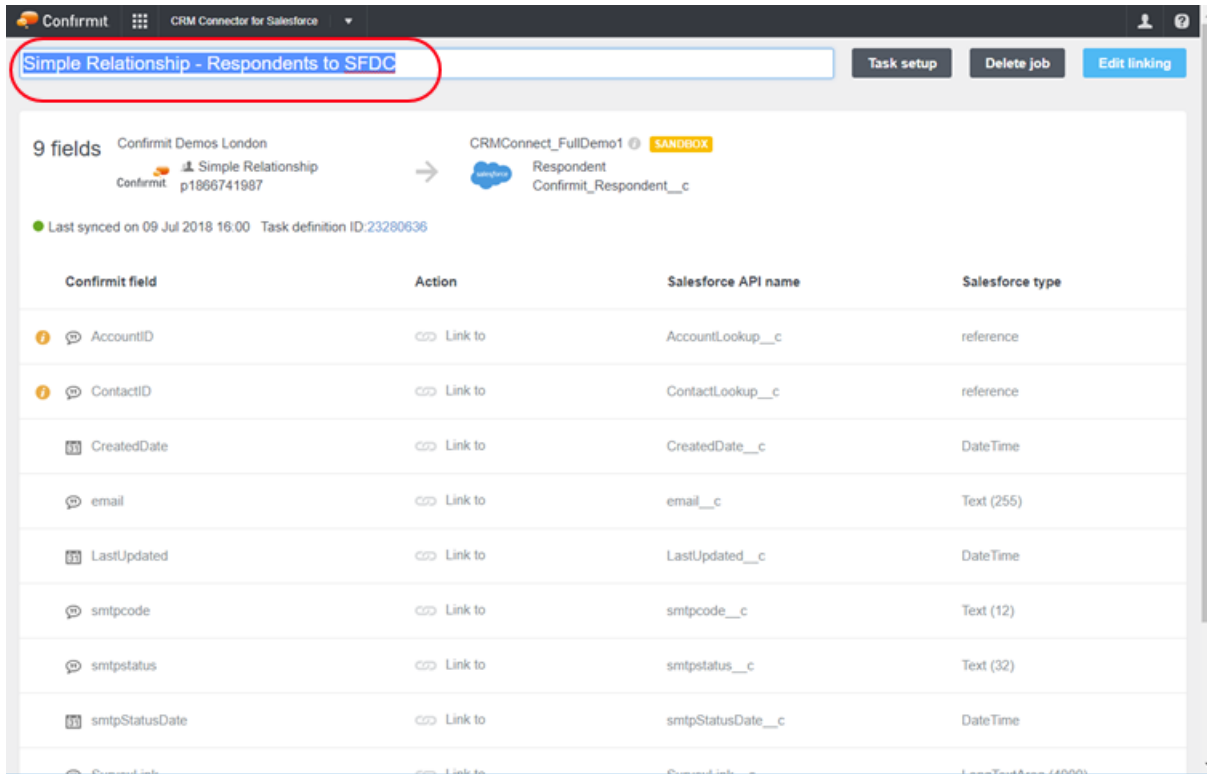


Figure 112 Editing the job name

Your changes will be saved when you click somewhere else on the screen outside of the text editing box.

4. Transferring Data from Salesforce to Confirmit (Flex Extension)

IMPORTANT

This feature will be deprecated soon, and should only be used by existing / legacy users. This section describes the older of the two possible workflows to import data from Salesforce into Confirmit. New CRM Connector users should not use this workflow but should instead use the newer workflow (see Transferring Data from Salesforce to Confirmit on page 11 for more information). There are many significant enhancements that are only available within the newer workflow.

Note: The CRM Connector for Salesforce to Confirmit is a company add-on and may be subject to payment. If your company has not licensed the add-on then the option will not be available in the Survey Management > Overview page. Refer to the Confirmit Acceptable Usage Policies (AUP) for further details. Only Chrome and Firefox browsers are currently supported.

The CRM Connector for Salesforce to Confirmit functionality appears as a Flex tab that you can embed as an add-on in a Confirmit online survey. This functionality enables you to transfer data from Salesforce to Confirmit through an easy-to-use setup wizard. Restrictions within Salesforce mean you can register a maximum of five jobs with Salesforce (see the note below), and the CRM Connector system will transfer a maximum of 20000 records per job (see How to Set Up a New Data Transfer Job (Salesforce to Confirmit Respondent Table) on page 13 for more information).

You can for example use this add-on to incorporate existing CRM data such as customer names and email addresses into a Confirmit survey respondent database so that you can then send that survey to those customers.

Note: To use this add-on you will need a Confirmit user with the `SYSTEM_API_ACCESS` permission. Contact your Confirmit system administrator. A dedicated user is provided as part of this feature when it is activated.

Important

Access to your Salesforce data is governed by Salesforce's Acceptable Usage Policies (AUP). To maintain optimum performance and ensure that the Salesforce API is available to all Salesforce customers, Salesforce imposes two types of limits: Concurrent API Request limits, and Total API Request limits. The Concurrent API Request limit restricts the number of jobs that can be run by one user. Currently, no more than five jobs can be registered per username. If a sixth job is created, Salesforce will automatically disable the oldest of the five existing jobs and this one will no longer work. You must therefore keep track of the number of jobs you have registered. Note that other usernames can set up data transfer jobs for the survey so there may be more than five jobs in the Data Transfer Jobs list.

4.1. Accessing CRM Connector for Salesforce to Confirmit (Flex Extension)

1. When in the survey to/from which you wish to transfer data, go to the **Survey Management > Overview** page.
2. Go to the **CRM Connect for Salesforce** tab.

The application expects that a valid Confirmit API account is assigned to the Company for the purpose of running the data transfer. This is obtained from Confirmit. In the absence of a valid API account, you will be prompted to supply the login details. Note that you will only need to log in the first time you access the API account. Once you have logged in the first time the information will be stored and will be fetched automatically on subsequent occasions.

CRM Connect for Salesforce

Confirmit API login

Integrating your survey with Salesforce CRM requires a valid [Confirmit API account](#)

API Username

API Password

Log in

Figure 113 The API Login page

3. Type your username and password into the fields and click **Log in**.
The Data transfer jobs page opens.

CRM Connect for Salesforce

Data transfer jobs

Add new job

Job Id	Description	External system	Transfer direction	Last transfer time	Last transfer outcome
7484922	Trial job	Salesforce	import	2015-02-26 06:13:54	✓

Modify Delete

Figure 114 The Data transfer jobs page

This page lists the jobs available to you and enables you to create new jobs, view the logs of and modify or delete existing jobs. The "Last transfer time" tells you when the job was last run, and the "last transfer outcome" tells you whether or not the job was successful. Click the **Last Transfer Outcome** icon for a job to view the job run history for that job (see How to View Data Transfer Jobs (Salesforce to Confirmit Flex Extension) on page 105 for more information).

4.2. The Procedures (Flex Extension)

There are five main procedures connected to this functionality:

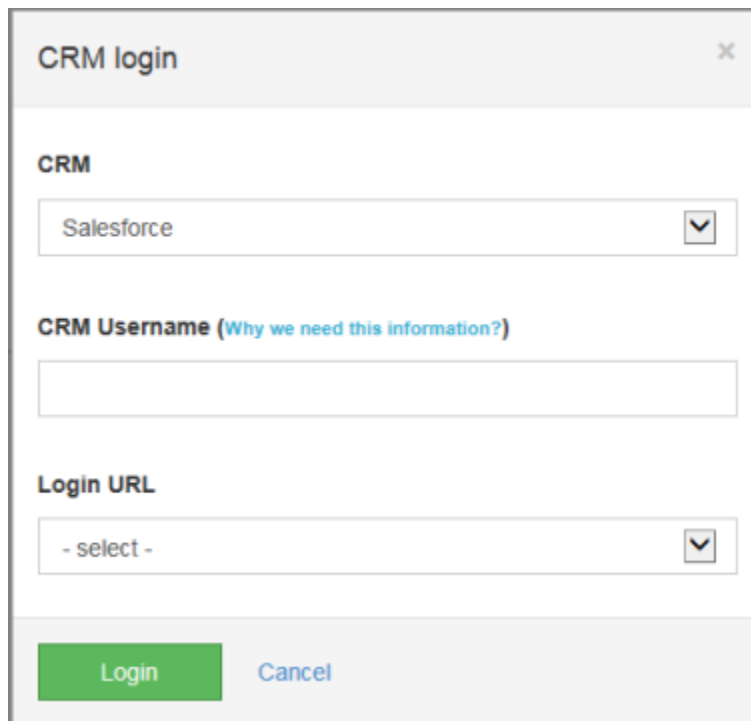
- Set up a new data transfer job (see How to Set Up a New Data Transfer Job (Salesforce to Confirmit Flex Extension) on page 100 for more information).

- View all the existing data transfer jobs for a given survey (see How to View Data Transfer Jobs (Salesforce to Confirmit Flex Extension) on page 105 for more information).
- Modify an existing data transfer job (see How to Modify an Existing Data Transfer Job (Salesforce to Confirmit Flex Extension) on page 107 for more information).
- Schedule a recurring job (see How to Schedule a Recurring Job (Salesforce to Confirmit Flex Extension) on page 107 for more information).
- Delete a job (see How to Delete a Job (Salesforce to Confirmit Flex Extension) on page 108 for more information).

4.2.1. How to Set Up a New Data Transfer Job (Salesforce to Confirmit Flex Extension)

Note: Once the job is run it will set a "last transferred" date on the job to the date it was processed. If you are using a recurring job based on the created date, the job will then only transfer records that are newer than the last transferred date (that is, records created after the job was last run).

1. When in the CRM Data Transfer tab, click the **Add new job** button.
The CRM login overlay appears.



The image shows a 'CRM login' overlay window. It has a title bar with 'CRM login' and a close button (X). Inside, there are three main sections: 'CRM' with a dropdown menu currently showing 'Salesforce'; 'CRM Username' with a text input field and a link '(Why we need this information?)'; and 'Login URL' with a dropdown menu currently showing '- select -'. At the bottom, there are two buttons: a green 'Login' button and a blue 'Cancel' button.

Figure 115 The CRM login overlay

2. Type in your CRM user name.

Important

Salesforce allows no more than five data transfer jobs to be registered per username. If a sixth job is created, Salesforce will automatically disable the oldest of the five existing jobs and it will no longer work. You must therefore keep track of the number of jobs you have registered. Should your username already have five jobs registered then you can create the job under a different username. Note that other usernames can set up data transfer jobs for the survey so there may be more than five jobs in the Data Transfer Jobs list.

3. Select the login URL that is to be used.

The Login URL will be the URL to the Salesforce login page you wish to use. If your company normally uses one particular login, then your Confirmit administrator can hard-code that URL into the system as the Default URL. If you select Custom URL then you can type the required URL into the field. The Salesforce login overlay opens.

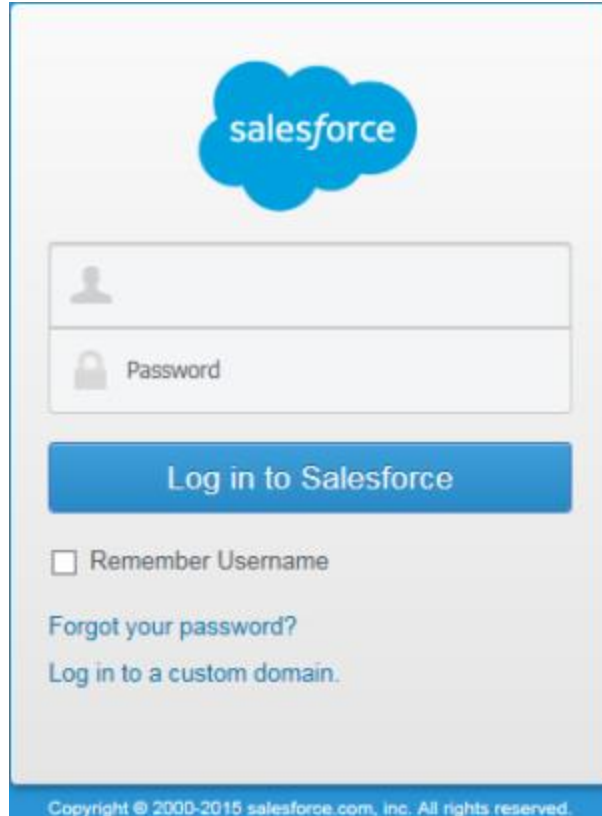


Figure 116 The Salesforce login overlay

4. Add your Salesforce username and password, then click the **Log in to Salesforce** button.
The Select fields page appears.

Figure 117 The Select fields page

5. Add a description. This will appear as the "name" of the job in the job list.
6. Currently, only the Import of data is supported.

Import means that data is transferred from Salesforce into Confirmit. The Import Location lists the objects available in your Salesforce installation. What is available to you will depend on the access permission you have for Salesforce.

Note: You can only connect to one Salesforce location for each transfer job. If you wish to connect to multiple locations, you will need to set up several transfer jobs. Bear in mind that required data can be merged or filtered using Data Processing rules before transfer.

7. Select the location in Salesforce from which the data is to be transferred.
The fields available in that Salesforce location are then listed in the left column. Note that the Salesforce alias for a field name is displayed by hovering the mouse pointer over that field name.
8. In the left column select the fields that you wish to transfer to the respondent database, then click the > button to move the selected fields to the right column.
A maximum of 30 fields can be selected. To select multiple fields press the **CTRL** key while you select the fields. In the event the list is extensive, you can start to type the desired field name and the list will jump to that field.
9. Click **Next**.
The Define page is then presented. Here you define the mappings between Salesforce and Confirmit for the fields that are to be transferred.

ID	External Field	Alias	Action	Confirmit Field
1	Account ID	AccountId	Link to	
2	Email Address	SuppliedEmail	Link to	

Figure 118 The Define page with selected Salesforce fields

If your database already includes the necessary fields then you can link directly to those fields. Open the drop-down list in the Confirmit Field column and select the appropriate field. If your database does not include the necessary fields, change the Action for that field to **Create new**, then type a name for the new field into the Confirmit field cell. Note that Confirmit naming conventions must be followed. For example you cannot use a space in the name, and a name can only be used once. In the event the validation check finds a problem, an error message will be displayed. When the job is run, any new fields required will be created in the database. Note that each Confirmit field can be mapped only once in a job.

- On completion click **Next**.

The Filter page opens. Here you can specify which data is to be included, and filter the data for the various fields.

Figure 119 The Filter page

- Data to be included** - specify which data is to be included in the transfer. Select between all data, only new data or only data that has been changed since the last time the job was run.

Note: Careful consideration should be given to the option selected here. Transferring all data each time a job is run will use considerable resources and can take time, so you should select to transfer only new or changed data when possible. Refer to the Confirmit AUP for further information.

- **Specify custom rules** - here you can filter the data for each field individually. In the first cell select the field you wish to apply a filter to, in the second cell select the type of operator, and in the third cell add the appropriate value. Add and set up a new row for each custom rule you wish to use. Note that some types of operator only apply to numerical data; if you set an unacceptable operator then an error message will be displayed when you click **Next**. Note that additional rules will be combined with the AND operator.

11. On completion click **Next**.

The Review page opens. Here you can check your selections and settings to ensure the correct data will be transferred. In the event you need to change anything, click Previous to return to the previous step in the procedure.

General Survey Status Url Setup CRM Connect for Salesforce

1 Select ✓ 2 Define ✓ 3 Filter ✓ 4 Review 5 Activate Previous Save Cancel

Please take a moment to review your job setup before you activate it

Fields selected for transfer

Account ID Email Address

Salesforce - Confirmit field mapping

1 Account ID		acnumber
2 Email Address		emailaddress

Data transfer conditions

Data selected is alldata

Figure 120 The Review page

12. When you are sure the setup is correct, click **Save**.

The Activate page opens. Here you activate the job; you can process the job immediately or you can schedule it for a later time.

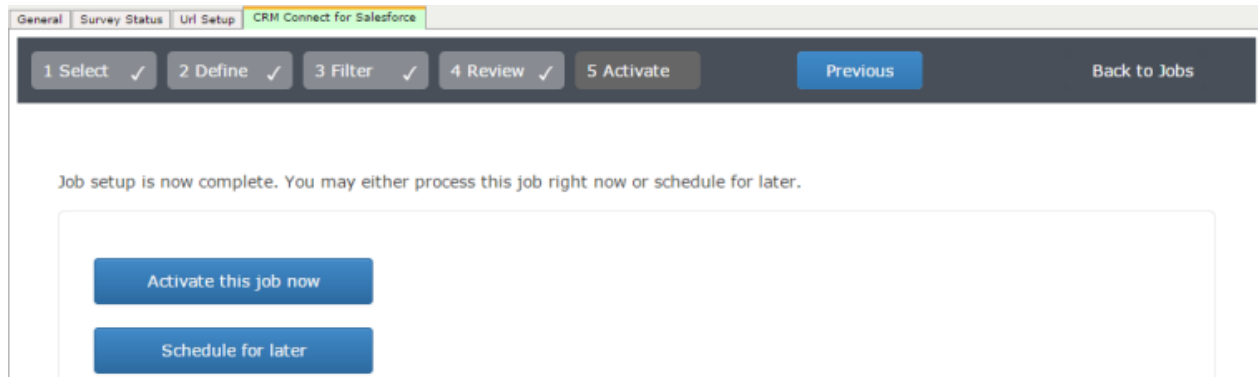


Figure 121 The Activate page

If you wish to schedule the job for later, you can then also make the job recurring such that it will repeat at specific dates, times or intervals (see How to Schedule a Recurring Job (Salesforce to Confirmit Flex Extension) on page 107 for more information).

If you activate the job, a Job execution log is displayed informing you of the progress.

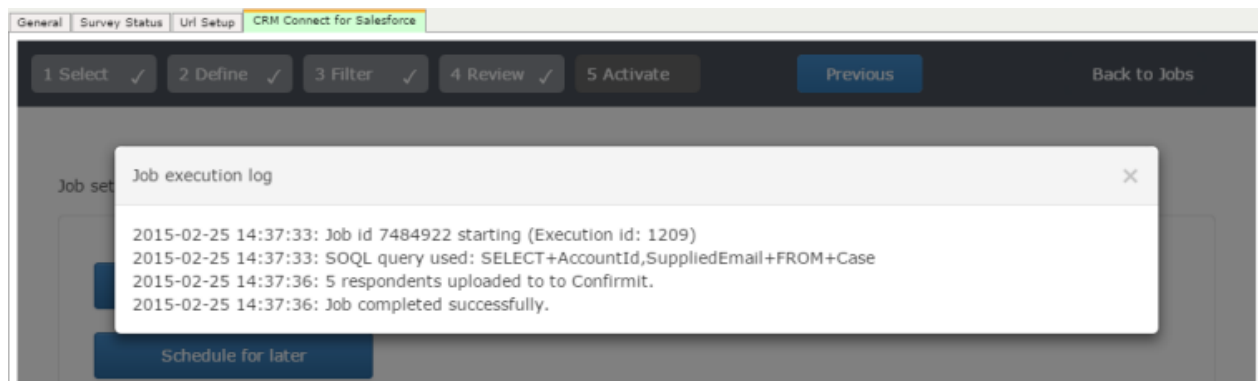


Figure 122 Example of the Job execution log

Click anywhere in the Activate page to close the log (you do not have to wait until the job is completed to close the window, but it provides a good overview of progress) then click **Back to Jobs** to return to the Data Transfer Jobs page. Note that you can view the information at any time by clicking on the Last transfer outcome icon for the job in the Data Transfer Jobs page.

4.2.2. How to View Data Transfer Jobs (Salesforce to Confirmit Flex Extension)

The Data Transfer Jobs page lists all the jobs that exist for the current survey (maximum five jobs).

Here you can click the **Last Transfer Outcome** icon for a job to view the job run history for that job.

General Survey Status Url Setup CRM Connect for Salesforce

Back to jobs

CRM Connect for Salesforce

Executed jobs

Number of rows

10

Search:

Job Id	Description	External system	Transfer direction	Transfer date	Message	Records transferred
7484922	Trial job	Salesforce	import	2015-02-26 08:13:53	2015-02-26 08:13:53: Job id 7484922 starting (Execution id: 1232) 2015-02-26 08:13:53: SOQL query used: SELECT+AccountId,SuppliedEmail+FROM+Case 2015-02-26 08:13:54: 5 respondents uploaded to to Confirmit. 2015-02-26 08:13:54: Job completed successfully.	5
7484922	Trial job	Salesforce	import	2015-02-26 08:03:36	2015-02-26 08:03:36: Job id 7484922 starting (Execution id: 1231) 2015-02-26 08:03:36: Processing error: Job execution started within 120 seconds of last instance. Please wait before rerunning the job.	-
7484922	Trial job	Salesforce	import	2015-02-26 08:03:25	2015-02-26 08:03:25: Job id 7484922 starting (Execution id: 1230) 2015-02-26 08:03:25: SOQL query used: SELECT+AccountId,SuppliedEmail+FROM+Case 2015-02-26 08:03:26: 5 respondents uploaded to to Confirmit. 2015-02-26 08:03:26: Job completed successfully.	5
7484922	Trial job	Salesforce	import	2015-02-25 14:37:32	2015-02-25 14:37:33: Job id 7484922 starting (Execution id: 1209) 2015-02-25 14:37:33: SOQL query used: SELECT+AccountId,SuppliedEmail+FROM+Case 2015-02-25 14:37:36: 5 respondents uploaded to to Confirmit. 2015-02-25 14:37:36: Job completed successfully.	5

Showing 1 to 4 of 4 entries

Previous

1

Next

Figure 123 Example of the Executed jobs page for a job

This page holds a row for each time the job has been executed. The total number of entries for the job (i.e. the number of times the job has been executed), and the total number of pages in the list are given, and you can set the number of rows that are to be presented on each page. Move to the next or previous pages in the list using the buttons in the lower-right corner.

In the event the list is extensive you can use the Search field to find the job you are looking for. Start typing an alpha-numeric text string into the field; any entry that does not include that text string will be removed from the list as you type.

You can sort the list into alpha-numeric order by any header; click a header to sort by that header, click again to reverse the sort order.

Click **Back to jobs** in the upper-left corner of the page to return to the Data transfer jobs list.

4.2.3. How to Modify an Existing Data Transfer Job (Salesforce to Confirmit Flex Extension)

In the **Survey Management > Overview** page, go to the CRM Connect... tab. All the data transfer jobs associated with the survey are listed here. Click the **Modify** button for the job you wish to modify - the Select page opens. This is the first page of the setup procedure (see How to Set Up a New Data Transfer Job (Salesforce to Confirmit Respondent Table) on page 13 for more information). You can now work your way through the procedure and modify the details as required.

4.2.4. How to Schedule a Recurring Job (Salesforce to Confirmit Flex Extension)

Once you have set up a job you can activate it immediately or you can schedule it to run at a later time. If you wish to schedule the job to run later, you can then also make the job recurring such that it will repeat at specific dates, times or intervals. Note that scheduling a job to run later, and/or recurring, does require some additional setting up within Data Processing .

1. In Data Processing, create a rule with Source and Target type set to **Survey Database**.
2. In the Source tab:
 - o Ensure the correct project ID is selected.
 - o In Columns, click on **Select Columns**, select all questions and click **Finish**.
3. Go to the CRM Connect job and click **Schedule for later**.

An overlay opens presenting some script and a description of what to do with it. This script will enable the DP rule you have created to find the job you have set up for the CRM system, and must be copied into the rule you are creating.

Schedule for later - copy code ✕

Copy the code below to set up a recurring rule in **Data Processing**.

```

AddLogWarning("Initiating CRM data transfer. This may take a few minutes. The task log will be updated when the process completes.");
var logMessages = ConfirmitCrmConnector.ProcessData("a8meGyeyK/PYQ4e4TNRtNb3QqM36qzj48kUqJ39jk=");
for(var i = 0; i < logMessages.length; i++) {
    var logMessage : String = logMessages[i];
    AddLogMessage(logMessage);
    if(logMessage.Contains("Processing error:")) throw new Exception(logMessage);
}
            
```

- Click on **Data Processing** from the top Confirmit menu.
- Click on **New Rule** option at the top right hand corner within your Rule List. When the New Rule Window appears, follow these steps:
- In the **General** tab: Generate a new rule with Source and Target Type **Survey Database**.
- In the **Source** tab:
 - Make sure the correct project id is selected.
 - In Columns, click on **Select Columns**, select all questions and click Finish.
- In the **Action** tab:
 - Copy the script specified in the last page of the CRM connector to Global script.
 - Click on Execute and select **Start time** ⚙ Schedule for later execution.
- In the **Recurrence** tab:

Figure 124 Example of the script to be copied

4. Copy the script to your clipboard.
5. Return to the rule you have created in point 1 above, go to the Action tab and paste the script you have copied into the **Global script** area.

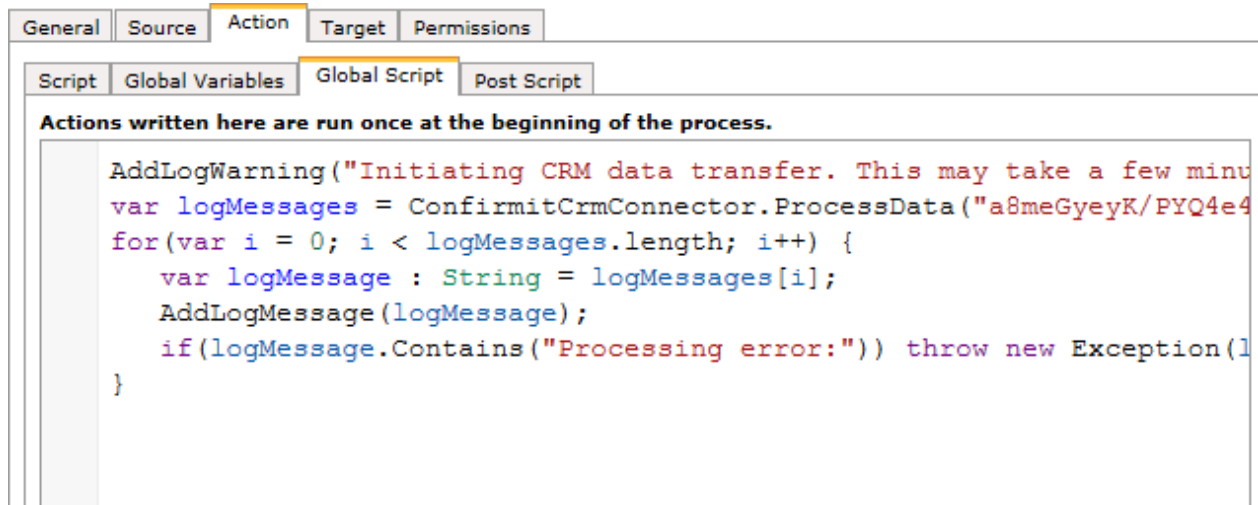


Figure 125 Pasting the script into the Action tab > Global Script field

6. Save the changes, then click **Execute** and select Start time to be **Schedule for later execution**.
7. In the Recurrence tab, set **Recurring Task** to **Yes** and set up the recurrence pattern as required.
8. Save the changes.

4.2.5. How to Delete a Job (Salesforce to Confirmit Flex Extension)

Jobs that are no longer required may be deleted. To do this:

1. In the Data transfer jobs page, find the job you wish to delete and click the **Delete** button.
The Confirm Job Deletion overlay appears.

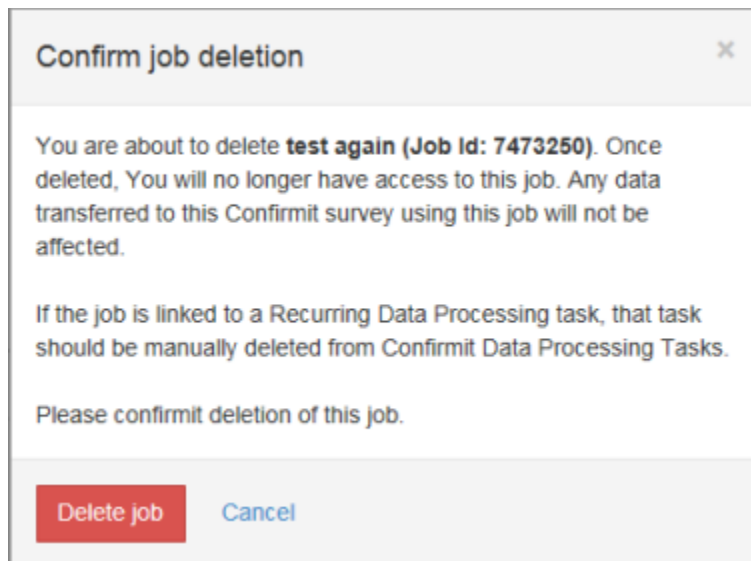


Figure 126 The Confirm Job Deletion overlay

2. Ensure you are deleting the correct job, then confirm the deletion by clicking **Delete job**.
The job is deleted and the Data transfer jobs list is updated.

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