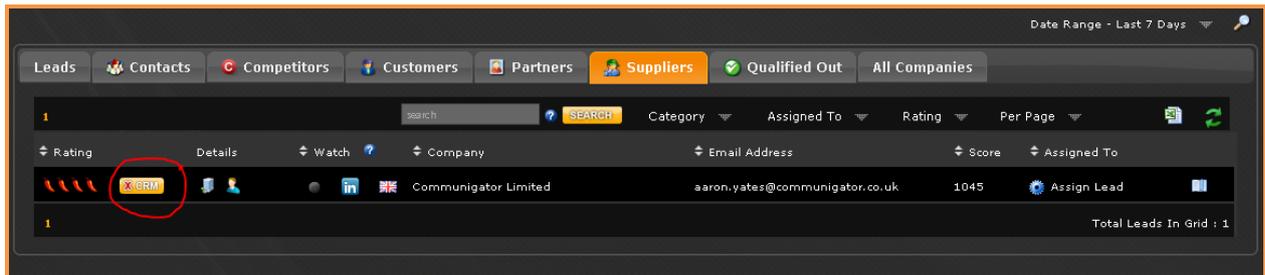# Microsoft Dynamics Integration

Background

Your WOW account can be activated to have a CRM button next to each company lead as in the diagram below.

This button goes to your CRM account to find if the company lead already exists as one of your CRM accounts. This is done through the standard Microsoft CRM Web Service layer available which does require to be publicly accessible as a website/url. The button has 3 states dependant on the actions you take for each company lead.

 This company lead has NOT been checked against CRM.

 This company lead has been assigned as a new LEAD in CRM.
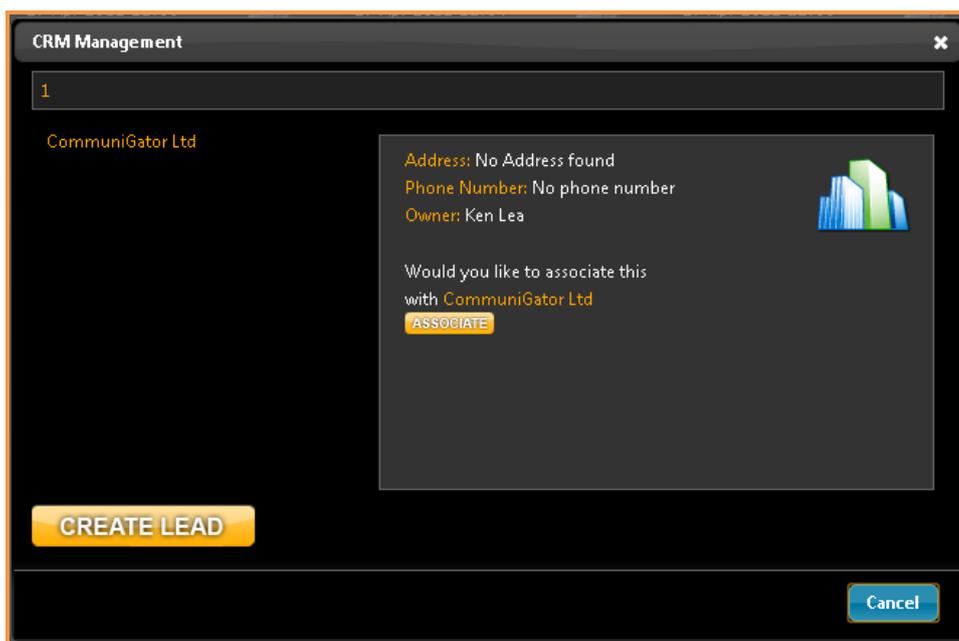
 This company lead has not be actioned against CRM yet.

Once the button is clicked there are 2 actions available dependant on whether the company lead exists in CRM or not.

1) If the company lead does not match to an existing CRM account, WOW will offer the below screen for you to create a CRM lead like below.

WOW Analytics Ltd, The Old Byrne, Peper Harrow, Godalming, Surrey, GU8 6BQ
0844 880 2899 | info@wowanalytics.co.uk | www.wowanalytics.co.uk

WOW Analytics

The CRM lead will be created with the Company name, a lead source value of 'Wow Analytics' and a permalink will be added. The perma link is a url that when clicked will bring up a browser window of the Company lead full details in WOW so you can see the historical clicks of the this company.

2) If the company lead does match to one or many existing CRM accounts (the matching uses a like/fuzzy match so any similar accounts will come back), then you will see address phone and owner details and have the ability to either:

   a. Associate this company lead in WOW to a CRM account – no further action is taken except the CRM button changes to let any users know this account has already been matched. You will be able to choose if many company matches available on which to associate.

   b. Create yourself a new lead as the companies match are not correct.

Setup

PLEASE NOTE YOUR MS DYNAMICS HAS TO BE PUBLIC FACING FOR WOW TO INTEGRATE

To set up your WOW account to integrate with Microsoft Dynamics, you will require the following pre-quisites:

1) Your CRM's public facing URL ie http:// ... Or https:// …..

2) A single CRM account with

    a. Username

    b. Password

    c. The orgnisation UniqueName

    d. The organisation FriendlyName

For security your public facing CRM can be locked down by the WOW public IP address.

Please speak to your MS Dynamics business partner for any of the above to be set up, WOW are not Microsoft Dynamic consultants that can do this for you.

When the pre-requisites are available they can be sent to the WOW support team and they will set up your WOW account to work against your CRM.

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