

This document contains conceptual and procedural information about implementing marketing automation workflows utilizing the ExactTarget for Microsoft Dynamics CRM 2011 integration.

## What Is Marketing Automation for Microsoft Dynamics CRM 2011

Marketing automation allows you to set up actions that take place either at predetermined times or upon execution of a specific event. For example, you can use marketing automation to create a workflow that performs the following actions:

- Checks a dynamic marketing list to view subscribers with today's date as a birthday
- Sends an email message to subscribers on that list
- Repeat this action once per day

## Why Use Marketing Automation for Microsoft Dynamics CRM 2011

Using marketing automation, you can trigger email sends automatically based on specific events. This both removes manual work from you and provides rapid feedback to a subscriber interacting with your message. You can also automate larger workflows with several steps (such as a drip campaign that sends messages at specific times after an initial interaction) that enhance the chances of a subscriber acting on your call to action.

## How to Create Marketing Automation for Microsoft Dynamics CRM 2011

Follow the steps below to create a marketing automation send:

1. In your Dynamics CRM 2011 instance, click **Workplace** in the lower-left corner of the screen.
2. Click **Activities** under the **My Work** heading.
3. Click **File** in the upper-left corner of the screen.
4. Select **ExactTarget**.
5. Select **Create Marketing Automation ExactTarget Send**.
6. Specify the email message you wish to use as part of the automation in the **Email** field.
7. Choose the field mapping set you wish to use as part of the send in the **Field Mapping Set** dropdown menu.

**NOTE:** This set must include mappings for each entity receiving sends as part of the marketing automation.

8. Enter the subject for your send in the **Subject** field. You can add personalization to your subject using the dropdown menu next to the **Subject** field.
9. Select the user from which you wish to send the email in the **From** dropdown menu.
10. Select the campaign to which to associate the email in the **Campaign** field (OPTIONAL).
11. Enter the send time you wish to use for the message in the **Send Time** section. If you wish to use the email as an immediate triggered send, leave the radio button set to **Immediately**.
12. Click the **Return individual tracking results as ExactTarget Responses** checkbox if you wish to retain tracking information that way.
13. Click the **I certify all email recipients have opted in** checkbox.
14. Click **OK**.

To conduct a send using a marketing automation workflow, follow the steps below:



1. Click **Settings** at the bottom-left of the screen.
2. Select **Processes** under the **Process Center** heading.
3. Click **New**.
4. Enter the name of your workflow in the **Process Name** field.

5. Select the entity to be affected by the workflow in the **Entity** dropdown menu.
6. Select **Workflow** in the **Category** dropdown menu.
7. Select the type of the workflow using the **Type** radio buttons. If you choose to use an existing template, choose that template in the workspace.
8. Click **OK**.
9. In the **Processes** workspace, click on your new workflow to open it.
10. Click **Add Step** to add steps to your workflow. For example, you would add a **Send** step and a **Wait 1 Day** step to create a simple daily send to a dynamic marketing list.
11. Ensure that your last step is a **Create: ExactTarget Send Recipient** step.
  1. Click **Add Step**.
  2. Select **Create Record**.
  3. Enter a name for the new step in the new step's field.
  4. Click the **Create** drop-down menu in the new step and select **ExactTarget Send Recipient**.
  5. Click **Set Properties**.
  6. Select the appropriate recipient type in the **Type** field:
    - ? If you select an **Individual** recipient, click the icon next to the **Regarding** field and select the primary entity to receive the message.
    - ? If you select a **Marketing List** recipient, click the icon next to the **Marketing List** field and select the marketing list to receive the message.
  7. Ensure that the **ExactTarget Send** field includes the marketing automation created earlier.
  8. When completed, click **Save and Close** twice.
12. In the **Processes** workspace, click the checkbox next to your new workflow and click **Activate**.

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