



Atrio Campaign 360
for CRM 2016/Dynamics 365

Installation Guide

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Introduction

This document is designed as introductory guide for Microsoft Dynamics CRM users to learn how to install and configure the product.

Atrio Campaign 360 allows for a campaign response to be created and track progress of your campaigns in real-time. The use of campaign responses permits you to manage and see the multiple touches from all campaigns and interactions. It also eliminates the need to manage duplicate leads generated during the import of lists. If a contact or lead does not exist a new one is created within CRM.

Features:

- Organize event campaigns and attendees
- Automatically track Opportunities when created from Campaign Responses
- Automate emails throughout the workflow
- Create Lead/Contact based on email matching
- Easily import a large amount of “Hand Raisers” (Campaign Response) through an Excel template
- Customizable record assignment and email notifications
- Adjust lead status and rating levels
- Provides more options to qualify lead using a custom ribbon button

Requirements/Compatibility

Atrio Campaign 360 is compatible with:

- CRM 2015 (7.0 and 7.1)
- CRM 2016
- CRM Online

The following browsers are supported:

- Internet Explorer 10+
- Google Chrome 43+
- Safari 8.0.5+
- Firefox 38.0.5+

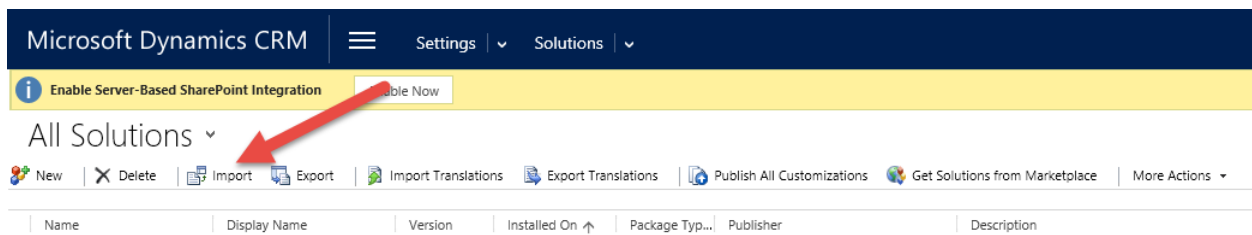
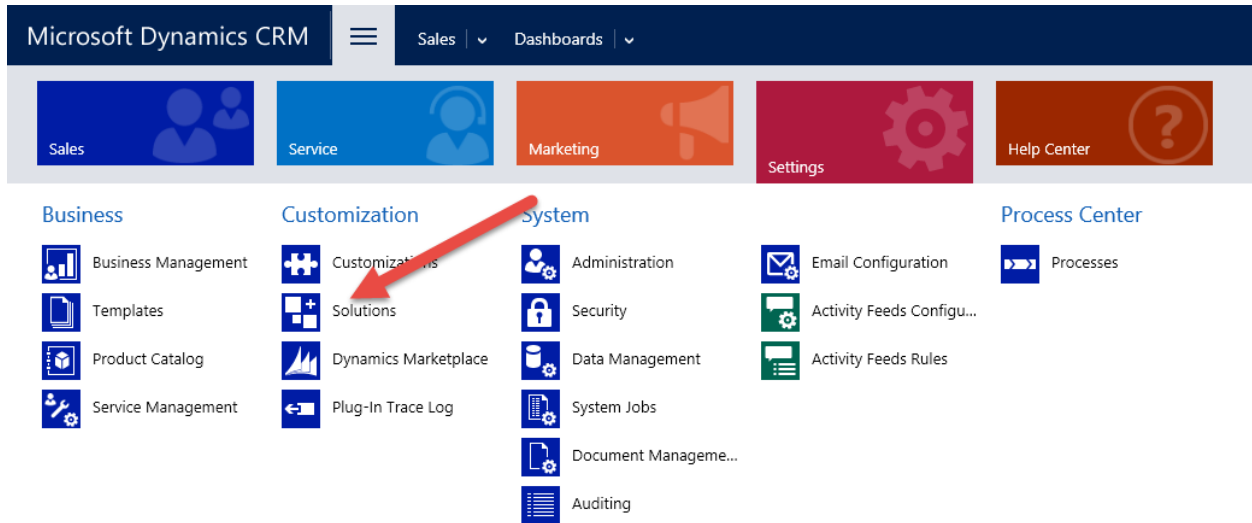
Atrio Campaign 360 may work on previous browser versions, the mentioned versions have been tested and are known to work.

The following solutions need to be installed beforehand

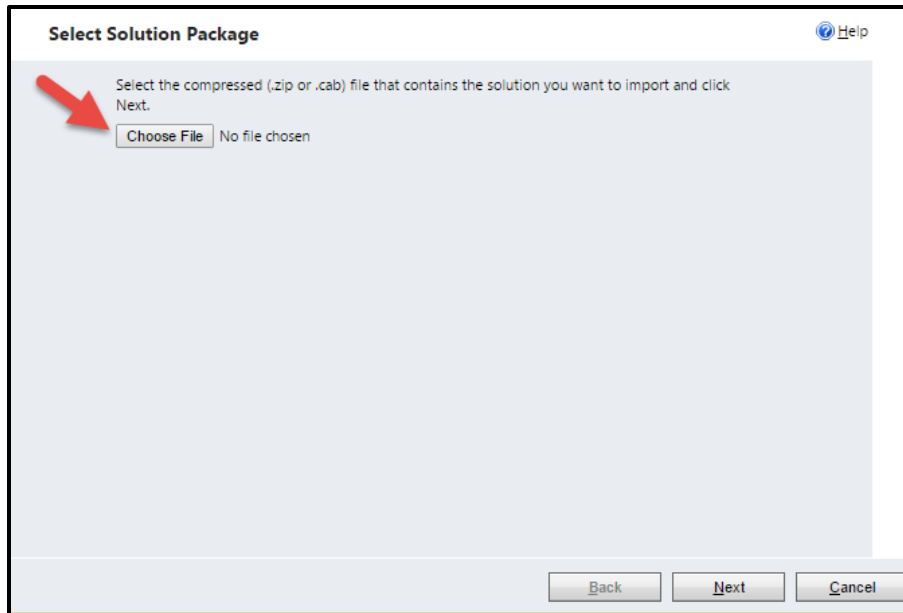
1. Atrio Common
2. Click Dimensions – for Atrio Campaign 360 version under 8.1.0.0.

Installing Atrio Campaign 360

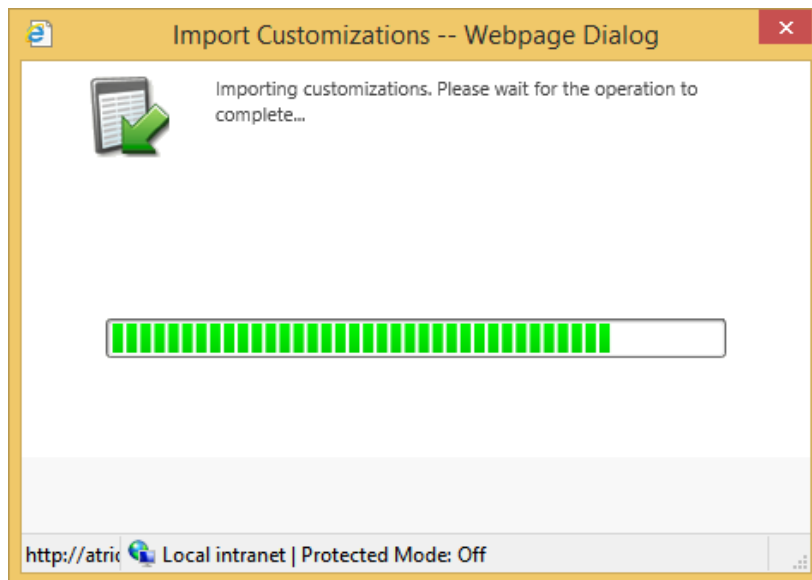
1. Before installing Atrio Campaign 360, backup the Contact, Lead, Campaign, Campaign response, and Opportunity entities. To do this, create a solution containing the above entities and export as an unmanaged solution. After completing the Atrio Campaign 360 installation, the solution needs to be imported back in.
2. When ready to install the solution, as an Administrator, navigate to **Settings** -> **Solutions** and click **Import** and browse for the managed solution.



3. Select the AtrioCampaignManager managed solution file under the **Choose File** button. Click **Next** -> **Import**.



4. A loading screen should appear followed by a dialogue box containing log files. Click **Close**.



5. If the solution was properly installed, the solution should appear in the **All Solutions** page

All Solutions ▾

[New](#) | [Delete](#) | [Import](#) | [Export](#) | [Clone a Patch](#) | [Clone Solution](#) | [Apply Solution Upgrade](#) | [Import Translations](#) | [Export Translations](#) | [Publish All](#)

Name	Display Name	Version	Installed On ↓	Package Typ...	Publisher
✓ AtrioCampaignManagement	Atrio Campaign Management	8.1.0.0	4/5/2017	Managed	Atrio Systems
AtrioCommon	Atrio Common	8.0.0.6	4/5/2017	Managed	Atrio Systems
BackupCampaign360	BackupCampaign360	1.0.0.0	4/5/2017	Unmanaged	Default Publisher for campaign360

6. Import the back-up solution containing the Contact, Lead, Campaign, Campaign response, and Opportunity created in step 1. Publish all customizations.

Set Up

Atrio Campaign 360 requires **Product Key** after 30 Days of use. To enter a purchased product key, follow the steps below.

1. Navigate to the **Solutions** page again and open up the **Atrio Campaign 360** solution.

Name	Display Name	Version	Installed On	Package Typ...	Publisher
AtrioCampaignManagement	Atrio Campaign Management	8.1.0.0	4/5/2017	Managed	Atrio Systems
AtrioCommon	Atrio Common	8.0.0.6	4/5/2017	Managed	Atrio Systems
BackupCampaign360	BackupCampaign360	1.0.0.0	4/5/2017	Unmanaged	Default Publisher for campaign360

2. The **Configuration Page** will appear. Towards the bottom of the page will be a slot for the product key. Type in the product key you received from Atrio and click **Submit**. If you do not have a product key, contact Atrio at support@atriosystems.com to receive one.

Atrio Campaign 360
Product Key Page

Summary: Atrio Campaign 360 allows for a campaign response to be created and track progress of your campaigns in real-time. The use of campaign responses permits you to manage and see the multiple touches from all campaigns and interactions. It also eliminates the need to manage duplicate leads generated during the import of lists. If a contact or lead does not exist a new one is created within CRM.

Enter the product key you received from Atrio below to start your paid version of Atrio Campaign 360. This solution will not work past the 30 day trial.

Product Key:

For product assistance or suggestions, contact support@atriosystems.com.

Configuration

Only for Atrio Campaign 360 with Click Dimensions

For Atrio Campaign 360 to work properly with Click Dimensions, the Campaign field on Posted Form must be filled out. To change the field to a required field follow the directions below.

1. Under the **Settings** drop down menu, click on **Customizations**. Select **Customize the system**
2. Expand Entities under Components. Locate the **Web Contents** entity
3. Under **Web Content**, select Fields and double click on the **cdi_campaignid** field

View:	All							
New X Edit More Actions ▾								
✓	Name	Schema Name ↑	Display Name	Type	Field Type	State	Field Security	Audit Status
	cdi_automationid	cdi_automationid	Campaign Auto...	Lookup	Simple	Managed	Disabled	Enabled
✓	cdi_campaignid	cdi_Campaignid	Campaign	Lookup	Simple	Managed	Disabled	Disabled
	cdi_categonrvid	cdi_Categonrvid	Categonr	Lookun	Simple	Managed	Disabled	Disabled

4. Under the **Field Requirement** drop down menu, select **Business Required**. Hit Save and Close

Field: Campaign of Web Content -- Webpage Dialog

File | Save and Close | Show Dependencies | Managed Properties | Actions ▾ | Help ▾

Field: Campaign of Web Content

Working on solution: Default Solution

Common | Information | Business Rules

General

Schema

Display Name * Campaign

Name * cdi_campaignid

Field Security Enable Disable

Auditing * Enable Disable

Description Unique identifier for Campaign associated with Web Content.

Field Requirement * **Business Required**

Searchable Yes

Appears in global filter in interactive experience Sortable in interactive experience dashboard

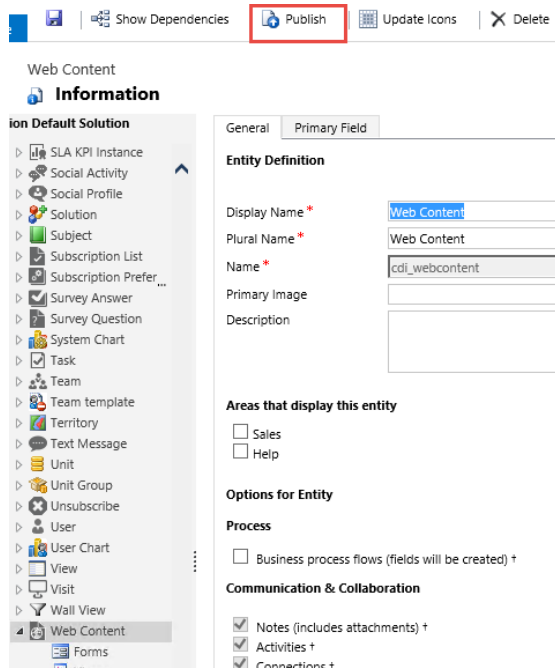
Type

Data Type * Lookup

Target Record Type * Campaign

Relationship Name * cdi_campaign_cdi_webcontent

5. Click on **Web Content**, click **Publish** to make the changes take effect.



On Web Content form, a red star should appear beside **Campaign** if done properly.

Support

Please send any product issues and suggestions to support@atriosystems.com.

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