

Scribe Default Mappings Guide

If your company has purchased a Scribe Online subscription it is suggested to invite the Silverpop Scribe team silverpopscribe@wwpdl.vnet.ibm.com so we may logon and assist with first level Scribe troubleshooting if needed.

Setting up Scribe

- Install a Scribe Cloud or On Premise Agent

<http://www.scribesoft.com/helpcenter/prod/online/en/sol/agent/agentinstall.htm>

- The implementations team will install a Silverpop Connector to your organization. Another purpose for the invitation to silverpopscribe@wwpdl.vnet.ibm.com

Setup Connections

<http://www.scribesoft.com/helpcenter/prod/online/en/sol/conn/crm.htm>

- a) MSCRM Connection -

[https://kb.silverpop.com/kb/Engage/Integrations/Microsoft_Dynamics_CRM_i/001_How_to/Administrator_Tasks/4_Set_up_Scribe_Online_\(Admin\)/Set_Up_Scribe_MSCRM_Connection](https://kb.silverpop.com/kb/Engage/Integrations/Microsoft_Dynamics_CRM_i/001_How_to/Administrator_Tasks/4_Set_up_Scribe_Online_(Admin)/Set_Up_Scribe_MSCRM_Connection)

- b) Engage Connection -

[https://kb.silverpop.com/kb/Engage/Integrations/Microsoft_Dynamics_CRM_i/001_How_to/Administrator_Tasks/4_Set_up_Scribe_Online_\(Admin\)/Set_Up_Scribe_Engage_Connection](https://kb.silverpop.com/kb/Engage/Integrations/Microsoft_Dynamics_CRM_i/001_How_to/Administrator_Tasks/4_Set_up_Scribe_Online_(Admin)/Set_Up_Scribe_Engage_Connection)

**If using an On-Premise Agent, logon to Engage from the server where the agent is installed to ensure communication is possible between Engage and the agent.

- Create a Solution -

http://www.scribesoft.com/helpcenter/prod/online/en/sy/sy_solution/sy_solutionconfig.htm

- Import the relevant mappings xml file for your implementation –

https://kb.silverpop.com/kb/Engage/Microsoft_Dynamics_CRMi/Scribe_Online/Silverpop_MSCRMi_Scribe_Maps

1. Leads and Contacts - [MSCRMDataSyncMapsLeadandContacts*.xml](#)
2. Contacts Only - [MSCRMDataSyncMapsContactsOnly*.xml](#)

These maps rely on the **Sync to Silverpop settings for Leads and Contacts in CRM

Below is an example of the Leads and Contacts **Basic Maps** after import

** A document is yet to be compiled for the **Advanced Maps** provided with the [Silverpop generic connector](#). Please open a Silverpop Support case with the CRMi team for assistance with Advanced Maps.

1 General 2 Agent 3 Maps 4 Schedule		
Create Maps		
<input type="button" value="+ NEW"/> <input type="button" value="EDIT"/> <input type="button" value="DUPLICATE"/> <input type="button" value="X DELETE"/> <input type="button" value="MOVE UP"/> <input type="button" value="MOVE DOWN"/> <input type="button" value="IMPORT"/> <input type="button" value="EXPORT"/>		
Enabled	Name	Description
Incomplete	1.) Engage to MSCRM New Lead	Insert New Lead from Engage to CRM
Incomplete	2.) Engage to MSCRM Opt_Out Lead	Opt-Out/Opt-In Leads from Engage to CRM
Incomplete	3.) Engage to MSCRM Opt_Out Contact	Opt-Out/Opt-In Contacts from Engage to CRM
Incomplete	4.) MSCRM to Engage Lead	Insert, Update, Reactivate Lead from CRM to Engage
Incomplete	5.) MSCRM to Engage Contact	Insert, Update, Reactivate Contact from CRM to Engage
Incomplete	6.) MSCRM to Engage Lead Merge and Deactivate	Merge and Deactivate (Soft Delete) Lead from CRM to Engage
Incomplete	7.) MSCRM to Engage Contact Merge and Deactivate	Merge and Deactivate (Soft Delete) Contact from CRM to Engage
Incomplete	8.) MSCRM to Engage Lead Conversion	Convert Lead to Contact from CRM to Engage
Incomplete	9.) MSCRM to Engage Lead Delete	Delete Lead (Hard Delete) from CRM to Engage
Incomplete	10.) MSCRM to Engage Contact Delete	Delete Contact (Hard Delete) from CRM to Engage

In the Leads and Contacts file, the first 3 Maps are for synchronizing Engage data to MS Dynamics CRM. The remaining 7 are for synchronizing MSCRM data to Engage.

The **Enabled** column is **Incomplete** because the Source and Target Connections have not been set.

1 General 2 Agent 3 Maps 4 Schedule				
Create Maps				
<input type="button" value="+ NEW"/> <input type="button" value="EDIT"/> <input type="button" value="DUPLICATE"/> <input type="button" value="X DELETE"/> <input type="button" value="MOVE UP"/> <input type="button" value="MOVE DOWN"/> <input type="button" value="IMPORT"/> <input type="button" value="EXPORT"/>				
Enabled	Name	Description	Source Connection	Target Connection
Incomplete	1.) Engage to MSCRM New Lead	Insert New Lead from Engage to CRM		
Incomplete	2.) Engage to MSCRM Opt_Out Lead	Opt-Out/Opt-In Leads from Engage to CRM		
Incomplete	3.) Engage to MSCRM Opt_Out Contact	Opt-Out/Opt-In Contacts from Engage to CRM		
Incomplete	4.) MSCRM to Engage Lead	Insert, Update, Reactivate Lead from CRM to Engage		
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Incomplete	9.) MSCRM to Engage Lead Delete	Delete Lead (Hard Delete) from CRM to Engage		
Incomplete	10.) MSCRM to Engage Contact Delete	Delete Contact (Hard Delete) from CRM to Engage		

Select a row of mappings to view and click on **Edit**.

Enabled	Name	Description	Source Connection
Incomplete	1.) Engage to MSCRM New Lead	Insert New Lead from Engage to CRM	
Incomplete	2.) Engage to MSCRM Opt_Out Lead	Opt-Out/Opt-In Leads from Engage to CRM	

The **RED** connection names are placeholders until the valid Engage and MSCRM connections for your organization are selected.

Source	Target
Connection: Select Your Engage Connection Silverpop Engage MSCRM Connector	Connection: Select Your MSCRM Connection Microsoft Dynamics CRM
Connection: Select Your MSCRM Connection Microsoft Dynamics CRM	Connection: Select Your Engage Connection Silverpop Engage MSCRM Connector

Use the drop down menus to select the appropriate connections. Pay close attention to the **type** of Source or Target connection being selected, these are not automatically filtered.

1) Engage to MSCRM New Lead

Source
Connection: **Select Your Engage Connection**

Entity

Process a CO SFDC

Process d Contoso CRM

based on Contoso Engage

Once the correct connections are selected, you may have errors related to the default fields from the Target and Source Connections that need to be mapped.

Edit Map for ContosoEngtst

Connections Fields 12 Errors, 0 Warnings

Errors and Warnings

T	Description
✖	Target field 'subject' has an invalid formula: Invalid Property name Leads.Topic Symbol Leads.Topic at cursor position 0
✖	Target field 'companyname' has an invalid formula: Invalid Property name Leads.Company Symbol Leads.Company at cursor position 0
✖	Target field 'description' has an invalid formula: Invalid Property name Leads.Description Symbol Leads.Description at cursor position 0
✖	Target field 'donotfax' has an invalid formula: Invalid Property name Leads.YesNo Symbol Leads.YesNo at cursor position 22
✖	Field 'new_dateonly' has an associated formula, but is not found in Target Entity 'lead'.
✖	Field 'new_timestamp' has an associated formula, but is not found in Target Entity 'lead'.
✖	Field 'new_floatingpointnumber' has an associated formula, but is not found in Target Entity 'lead'.
✖	Field 'new_optionset' has an associated formula, but is not found in Target Entity 'lead'.
✖	Target field 'address1_telephone1' has an invalid formula: Invalid Property name Leads.Phone Symbol Leads.Phone at cursor position 22
✖	Target field 'telephone1' has an invalid formula: Invalid Property name Leads.Phone Symbol Leads.Phone at cursor position 22
✖	Target field 'numberofemployees' has an invalid formula: Invalid Property name Leads.numeric Symbol Leads.numeric at cursor position 22
✖	Target field 'address1_city' has an invalid formula: Invalid Property name Leads.TimeOnly Symbol Leads.TimeOnly at cursor position 22

In the first error, the Target (CRM) subject field is not mapped to a field in the Source (Engage) yet. In MS Dynamics CRM the Topic\Subject field on the Lead entity is a required field so Scribe will automatically suggest it needs to be mapped.

To help identify the needed maps quicker, Sort the Target map by **Formula** to see which fields are required

- Before Sort

Connections Fields 12 Errors, 0 Warnings

Source: Contoso Engage

Name	Type (size)
Leads	
City	String(1024)
CompanyName	String(1024)
Country	String(1024)
CRM_SYNC_ID	Guid
EMAIL	String(1024)
FirstName	String(1024)
Gender	String(1024)

Target: Contoso CRM

Name	Type (size)	Formula
lead		
accountid	Guid	
accountidname	String(4000)	
accountidymname	String(4000)	
address1_addressid	Guid	
address1_addrstypcode	Integer32	
address1_addrstypcode_displayname	String(255)	
address1_city	String(80)	IF(ISNULLORWHITESPACE(Leads.TimeOnly), null, Leads.TimeOnly)

- After Sort

Connections Fields 12 Errors, 0 Warnings

Source: Contoso Engage

Name	Type (size)
Leads	
City	String(1024)
CompanyName	String(1024)
Country	String(1024)
CRM_SYNC_ID	Guid
EMAIL	String(1024)
FirstName	String(1024)
Gender	String(1024)
Industry	String(1024)
LAST_MODIFIED_TIME_START	DateTime
LastName	String(1024)
LeadSubject	String(1024)
OPT_OUT	Boolean
RECIPIENT_ID	String(1024)
SendHour	String(1024)

Target: Contoso CRM

Name	Type (size)	Formula
lead		
sp_syncctoengage	Boolean	true
subject	String(300)	Leads.Topic
sp_engageid	String(100)	Leads.RECIPIENT_ID
donotemail	Boolean	Leads.OPT_OUT
lastname	String(50)	Leads.LastName
firstname	String(50)	Leads.FirstName
emailaddress1	String(100)	Leads.EMAIL
description	String(1048576)	Leads.Description
leadid	Guid	Leads.CRM_SYNC_ID
companyname	String(100)	Leads.Company
donotfax	Boolean	IF(ISNULLORWHITESPACE(Leads.YesNo), null, IF(Leads.Y...
address1_city	String(80)	IF(ISNULLORWHITESPACE(Leads.TimeOnly), null, Leads.T...
address1_telephone1	String(50)	IF(ISNULLORWHITESPACE(Leads.Phone), null, Leads.Phoi...
telephone1	String(50)	IF(ISNULLORWHITESPACE(Leads.Phone), null, Leads.Phoi...
numberofemployees	Integer32	IF(ISNULLORWHITESPACE(Leads.numeric), null, Leads.nu...

Connections		Fields ✖	7 Errors, 0 Warnings
Errors and Warnings			
↑	Description		
✖	Target field 'companyname' has an invalid formula: Invalid Property name Leads		
✖	Target field 'address1_telephone1' has an invalid formula: Invalid Property name		
✖	Target field 'numberofemployees' has an invalid formula: Invalid Property name		
✖	Target field 'address1_city' has an invalid formula: Invalid Property name Leads.		
✖	Target field 'telephone1' has an invalid formula: Invalid Property name Leads.Ph		
✖	Target field 'donotfax' has an invalid formula: Invalid Property name Leads.YesN		
✖	Target field 'subject' has an invalid formula: Invalid Property name Leads.Topic		

This will also help identify the fields that need to be created in Engage if they do not already exist.

Suggested Engage fields to create

Engage Field Name	CRM Matching Field	Other Notes
First Name	FirstName	
Last Name	LastName	Required by CRM
Company	CompanyName	Required by CRM
Subject	Subject	Required by CRM
City	Address1_city	
State	Address1_State	
Zip	Address1_PostalCode	
Phone	Address1_Telephone1	

Example of completed Defaults

Target: Contoso CRM			
Name	Type (size)	Formula	
^ lead			
sp_synctoengage	Boolean	true	
sp_engageid	String(100)	Leads.RECIPIENT_ID	
address1_telephone1	String(50)	Leads.Phone1	
donotemail	Boolean	Leads.OPT_OUT	
subject	String(300)	Leads.LeadSubject	
lastname	String(50)	Leads.LastName	
firstname	String(50)	Leads.FirstName	
emailaddress1	String(100)	Leads.EMAIL	
description	String(1048576)	Leads.Description	
leadid	Guid	Leads.CRM_SYNC_ID	
companyname	String(100)	Leads.CompanyName	
address1_city	String(80)	Leads.City	
contactid	Guid		
emailaddress3	String(100)		