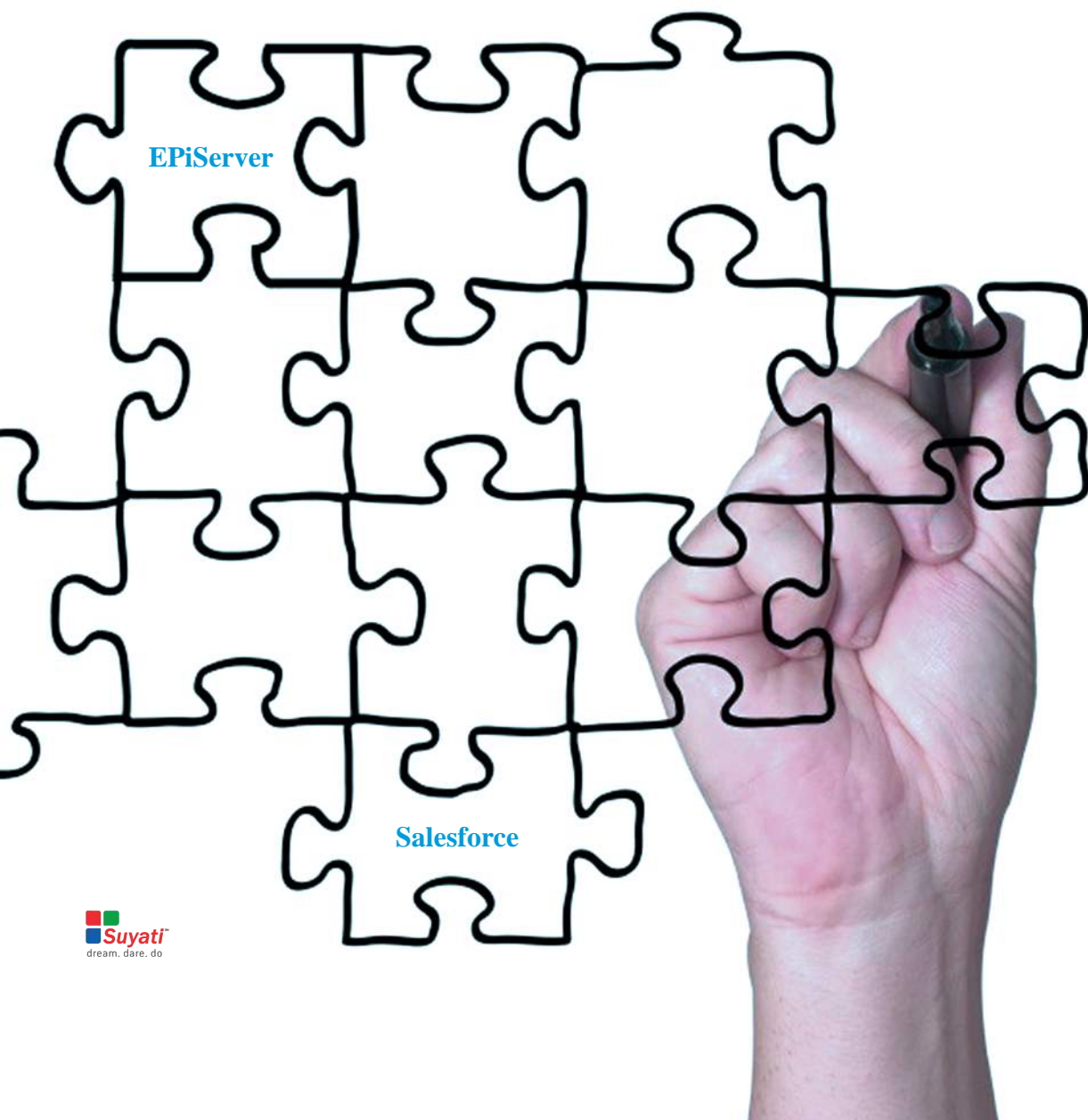


Seamlessly Integrate your EPiServer CMS with Salesforce CRM

EPiServer Connect for CRM facilitates easy integration of EPiServer CMS with CRM suites, including Salesforce. In today's competitive world, the integration of CMS with CRM allows enterprises to deliver more targeted and personalized customer experience.



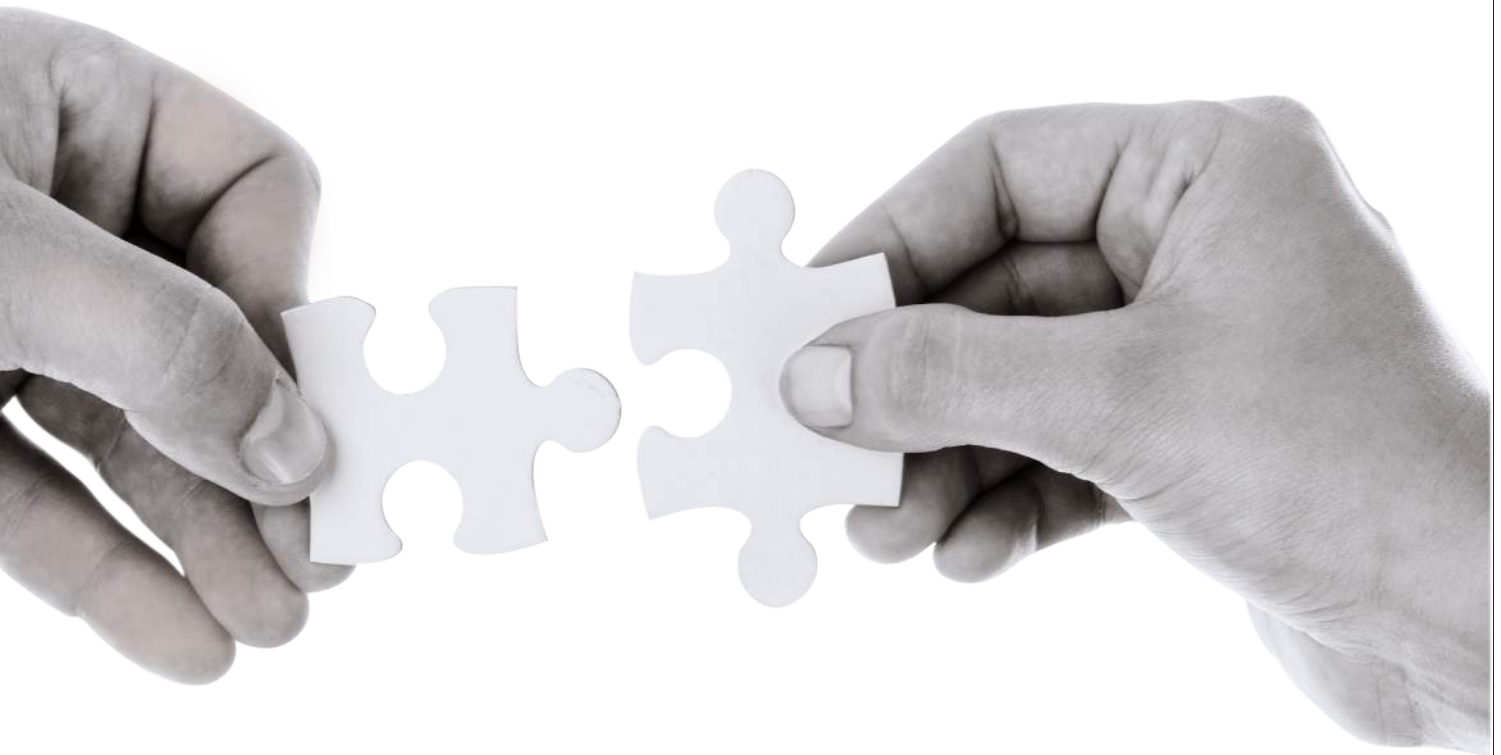
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Introduction⁰¹

A CMS to CRM connector add-on must ideally ensure that the website's visitor data remains synced with the data in the CRM suite, and enables delivering a personalized customer experience. EPiServer Connect for CRM is one such add-on, and it integrates EPiServer CMS with Salesforce and Microsoft Dynamics CRM.

Enterprises would do well to connect their Content Management System (CMS) with their Customer Relationship Management (CRM) suite for seamless operations and smooth flow of data. In fact, such a move is essential to customize engagement with prospects in real time and deliver a personalized customer experience – a move considered critical in today's hyper competitive business environment. EPiServer is one of the newer entrants in the league of big CMS, especially after its takeover of Ektron; and EPiServer Connect facilitates easy integration of this CMS with CRM suites, including Salesforce.



Why Integrate? ⁰²

Integrating *EPiServer CMS with Salesforce CRM* offers a host of benefits for the enterprise.

It facilitates a personalized customer experience. Administrators may customize the content delivered from the CMS to each user, using the CRM. For instance, while new prospects may be shown a webpage that contains content on special offers for sign ups, returning customers may be given access to an additional “support” page of the website, and so on.

- It becomes possible to integrate all users, including extremal users and casual web visitors to the CRM system. What this means is that such a large corpus of leads or prospects becomes automatically available for the sales team, for inclusion in various marketing and promotional activities that may lead to potential sales.
- It automates the process of capturing new leads from the website and creating matching contacts in Salesforce. While doing so, it also checks for duplicate contacts and verifies email addresses. With all these automated tasks, the sales team not only gets immediate access to the latest leads, but also gets access to accurate and reliable data, even as they spend less time than before in updating the CRM.
- EPiServer Connect improves data security. The back-up features keep data safe and accurate, even when the CRM is down.
- The enterprise can manage the business data using the CMS and share it across the enterprise using the CMS on a need-basis. It is also possible to assign different levels of access to different team members, as EPiServer Connect for CRM syncs the permission levels with the website to ensure sensitive data do not fall into the wrong hands.

Integrating the CMS with the CRM also helps in breaking down silos. Many enterprises store website visitors and even registered users as a separate silos database, exported to the main CMS on a need basis. This has its own inefficiencies, including threat of exporting inaccurate or outdated data, difficulty in importing the data into other systems and applications, and more. With the CMS integrated to CRM, registered visitors may be integrated to the company’s existing database; they include customers, suppliers, partners and members. This facilitates more powerful analytics and faster decision making.

How it Works⁰³

The integration of EPiServer and Salesforce using EPiServer Connect is through a control panel on the front end and relational data at the backend.

EPiServer CMS supports Windows, SQL Server, Oracle, Active Directory, and also the Membership providers out of the box, and connects to Salesforce using the connector module. EPiServer CMS implements a standard ASP.NET membership, role and profile providers. It offers multiple store providers that can be used simultaneously. The internal users are managed in active directory and the external users are managed in the CRM system. The connector modules automatically capture new users whenever they enter the website and create new accounts and contacts in the CRM system.

EPiServer Connect for CRM includes an embedded web registration wizard for the extranet users of the website. The wizard automates the process of capturing new users on the website. It also creates new Accounts and Contacts in the CRM system, according to the predefined rules of the organization. The focus of the connector is to ensure the integration of the registered users on your website with the CRM solution, and avoid the storage of the users in an isolated database.

The tool registers new users for the CRM application using a Web user control at the *client layer*. It is possible to add additional user controls or custom controls easily to this layer, with such controls manifesting in the user interface.

EPiServer performs a CRM lookup during the registration process, to prevent registering of duplicates. The system verifies the validity of the e-mail address, and gives basic role and access rights automatically. It is possible to manage access rights manually at the user level from the CRM system.

EPiServer Connect for CRM makes it possible to administer user roles and access rights for extranet users directly from the CRM system. It is possible to assign each user with high or low level user rights to specific parts of the website. The system is synced so that the website is automatically updated to reflect changes when administrators change access rights in the CRM. EPiServer Connect for CRM may also be adapted to support the company's own access right groups.

When a user logs into the website with an appropriate ID, the system retrieves role settings from the table of contacts of the CRM application. It is possible to create custom setting in the contract table for the CRM application, to control the contents of the site for the specific user, or to regulate which specific pieces of content should be made available to specific users.

Users may manage their personal data given during the registration process from the website's "My settings" page. Such personal data, stored under the contact in the Salesforce CRM will be automatically updated with new information. EPiServer resources draw information directly from the CRM. However, should the CRM application remain not accessible for any reason, there is a read only reserve profile – a special build-in cache or fallback mechanism to retrieve settings. Personal data and roles are mirrored to the Web, and extranet users may still log in to the website and access "My settings" page even when the CRM system is unavailable due to connection failure or maintenance. This ensures high performance and availability even when the CRM is not available.



EPiServer Connect has a **business layer**, containing a set of interfaces for Contact and Account business entities. This layer conceals the difference between the CRM application and Salesforce, and delivers a seamless experience for the user.

The CRM Base Factory class can be used to create examples of business entities, depending on the settings files. This Factory requires an appropriate Web service method to return the instance that is initialized with CRM values.

Another layer, the **database layer**, contains Web service proxy classes and cache management classes for each CRM application. It comes with a helper class for simplification of the work with proxy wrappers.

An indexer accesses the values of the business entity instance. The parameter for the indexer should be the name of the field from the application setting file.

For security reasons, it is a must to verify each connection. Each call to the CRM system affects the application performances, and the developer may use a cache mechanism. It is also very important to configure an application-setting file correctly, since the security changes applied using the CRM system affect the whole set-up without any prior notification.

Customization Options ⁰⁴

EPiServer Connect for Salesforce offers options for customization.

Personal data can be customized and extended to meet customer needs. Users can manage the personal data from the registration process themselves by accessing the “My Settings” page. A built-in cache ensures that all personal data stored on the contact in Salesforce CRM will automatically update to reflect the new information.

The *architecture of EPiServer Connect* for CRM contains a client layer, a business layer, and a database layer. These layers offer both consistency and flexibility to make changes. The client layer incorporates a Web user control for new user registrations to the CRM application; which allows the easy addition of supplementary user controls or custom controls to this layer. Salesforce CRM has its own interfaces that can be customized, and the client layer makes it possible to apply UI controls, including applying custom controls.

It is also possible to create a set of custom settings in the contact table of the CRM application, containing roles for a CRM contact. When a user logs in to the website, the Contact table of the CRM application retrieves appropriate ID and role settings. Depending on the settings of the user roles, it is possible to control the site content and show or hide parts of the information for different user groups. When access rights change, the website automatically updates to reflect such changes.

Limitations⁰⁵

Plugins and extensibility are among EPiServer's core strengths, and providing an official connector for Salesforce is a smart move. However, with respect to features, the connector is adequate only for simple integrations. Several limitations surface when complex integrations are required.

Two prominent limitations, which usually surface when trying to integrate complex, non-routine projects are:

EPiServer Connect:

1. Supports the retrieval of attributes of only a few CRM types
2. Works only with Contact and Account entities by default

Also, despite the range of customizations on offer, the tool supports only standard or *native CRM entities* (Accounts and Contacts), not custom entities. Similarly there is no out-of-the-box support for custom attribute types. CRM entities and attributes are defined/mapped in config files, not in code, and the user has to make changes and immerse themselves in changing config files during the setup process.

Again, EPiServer Connect for CRM costs high, and the license falls into the enterprise end of the spectrum. The source code is proprietary, and not open to modifications.

Enhancing the EPiServer Connect tool with the following functionalities would make it more complete and comprehensive offering the following *abilities*.

Ability to:

- Perform CRUD operations on all types of entities, both custom and standard.
- Read and update all types of entity attributes, both custom and standard.
- Conditional search for entities

Challenges⁰⁶

Notwithstanding all the possibilities, EPiServer Connect for Salesforce works only when robust connectivity is available. The tool offers a cache and the ability to affect the changes in the CRM as soon as connectivity is established, but this is in the assumption that connectivity is always only a few minutes away. If the connectivity breaks down for some reason, the changes made in the tool will not reflect in the CRM, creating major distortions and confusions. Even delays in sync, owing to connectivity issues, can pose challenges.

Overcoming these challenges and ensuring seamless connectivity is an important pre-requisite for the success of the *EPiServer Connect tool*.



About Suyati⁰⁷

Suyati provides marketing technology and integration services for companies that wish to combine the best of breed solutions and create a unified approach to customer acquisition. This unified digital marketing approach requires system integration between various CMS and CRM platforms, and a slew of e-commerce, Marketing Automation, Social Media Listening, email and social marketing, and customer service systems. Our specialized knowledge in Salesforce, open source, and .Net based systems enables us to build effective custom integrated solutions for our clients.

Suyati's custom technology solutions have been deployed in companies in the US, Western Europe, and Australia, and have helped many enterprises leverage the web/-cloud/mobile technologies to acquire customers through integrated digital marketing. Suyati is based in Chicago with product engineering capability out of the US and India.

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