

# Microsoft Social Engagement for Dynamics CRM

Gain real-time understanding of your customers and your business across the social web within Dynamics CRM.

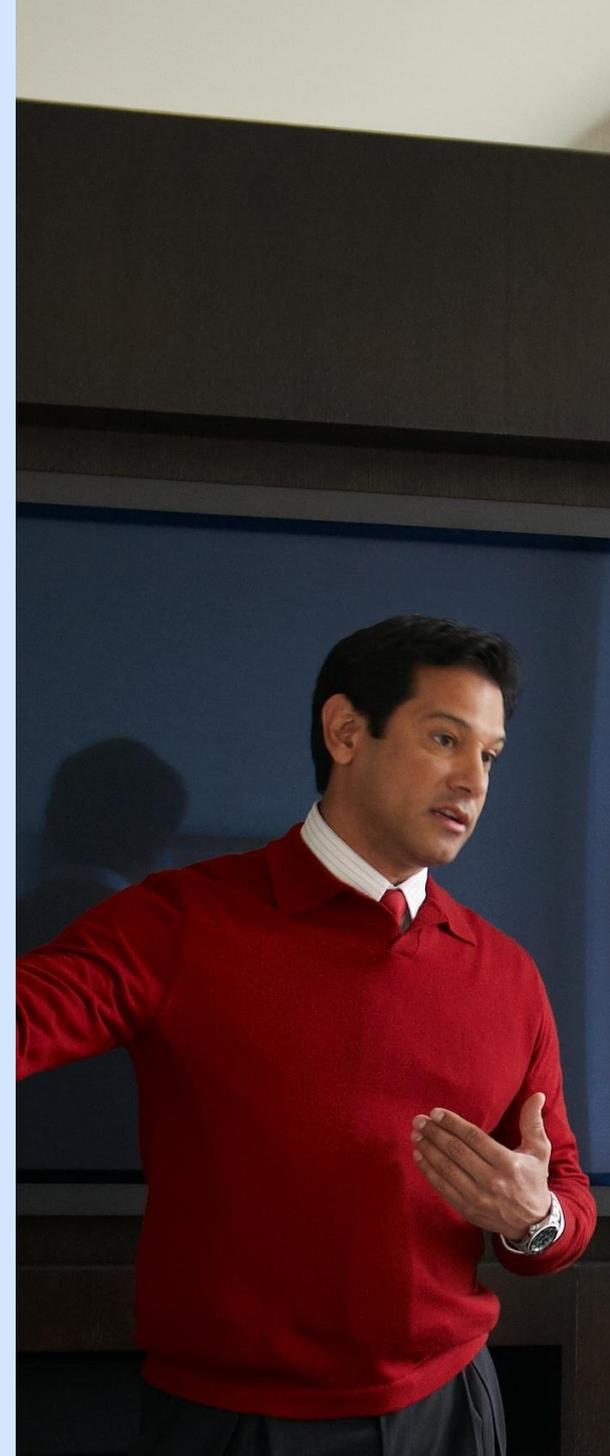
Version 3.0



# contents

This eBook covers:

- [Brief introduction of Social Engagement](#)
- [Set up Social Engagement dashboards and visuals in CRM](#)
- [Gallery of Social Engagement visuals](#)
- [Next steps and help resources](#)



# gain valuable social insights right in CRM

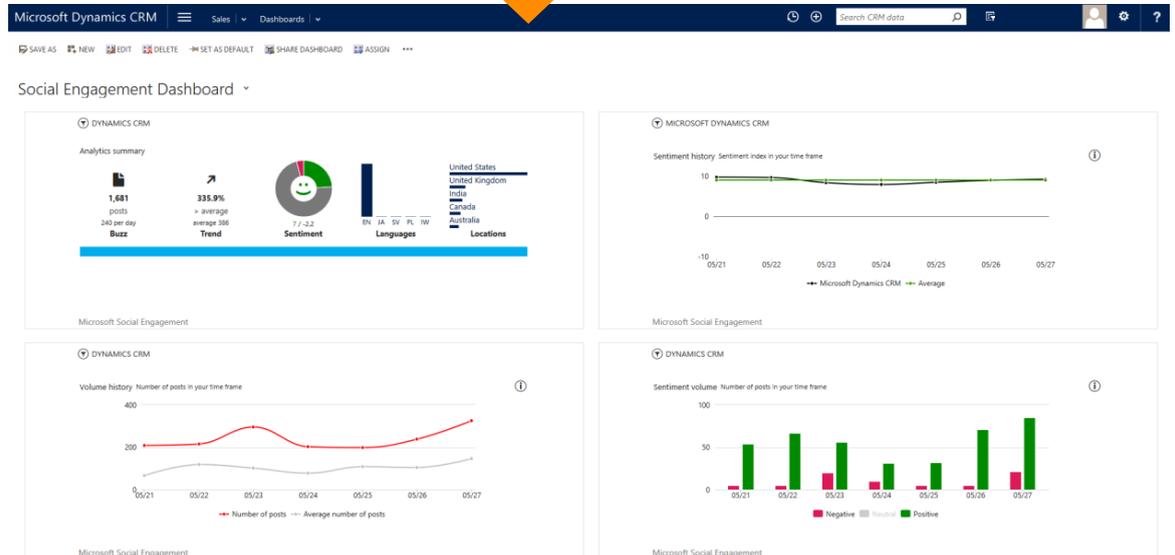


Stay on top of what's going on with your business and customers on social media and track your products, brands, competitors, and campaigns.

Microsoft Social Engagement is a powerful service that your organization can use to monitor social media channels like Facebook and Twitter.

Social Insights are available in Microsoft Dynamics CRM Online Spring '14 or later and CRM 2013 Service Pack 1 (SP1) or later releases.

You can add charts and graphs to dashboards right in CRM, or add them to the forms for different types of records, such as accounts, contacts, or competitors.



Add social dashboards and charts to view and act on social media events in CRM

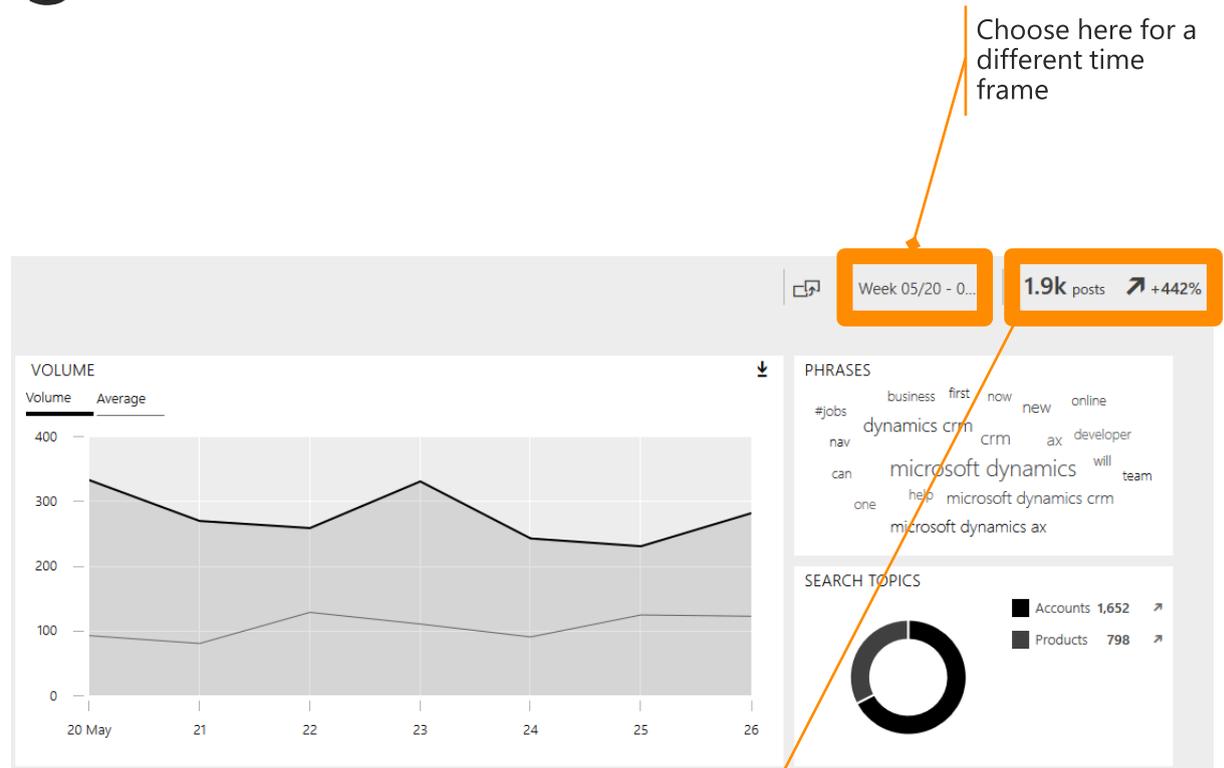


# how Social Engagement works

Microsoft Social Engagement puts powerful social tools in the hands of your sales, marketing, and service teams—helping them to gain insight into how people feel about your business and to proactively connect on social media with customers, fans, and critics.

These visuals help you spot emerging trends in people's comments, track marketing campaigns, respond to service issues before they escalate, or gain insights about your competitors.

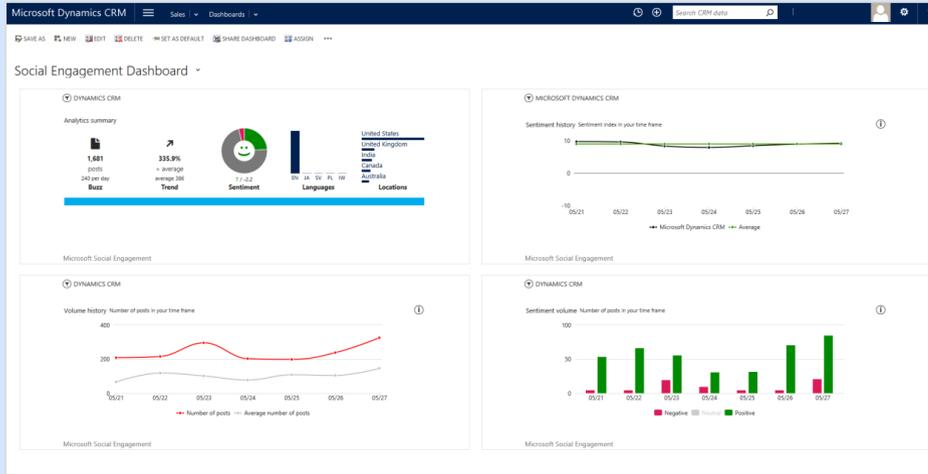
Read more about how Social Engagement works and how it can help your business in the [eBook: Introducing Microsoft Social Engagement](#).



In this example, our products have gotten 1,900 posts in the past week, which is over 4 times than the average of the weeks before. So the trend raises significantly.



# let's try it in CRM!



## To use Social Engagement in CRM, you'll need:

- Access to the Social Engagement app in Office 365. (For CRM Online admins: Social Engagement and CRM Online must be on the same tenant.)
- User licenses for both CRM and Social Engagement. More information: [Assign a license to a user](#)
- A connection between CRM and Social Engagement. More information: [Connect to Microsoft Social Engagement](#)

If you have questions about these items, please contact your system administrator.

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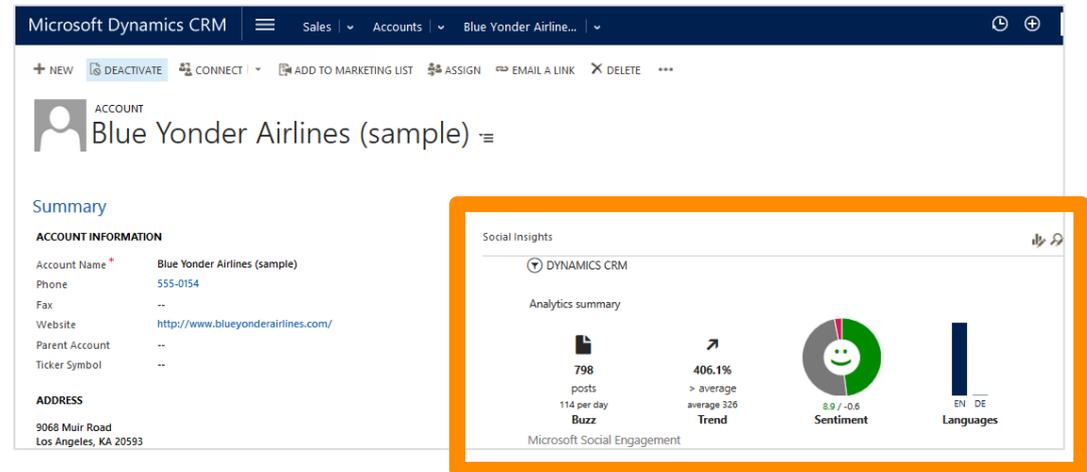
# show Social Engagement widgets in CRM

Now that you know a bit more about what Social Engagement can do, you're probably ready to add your own visuals or set up searches.

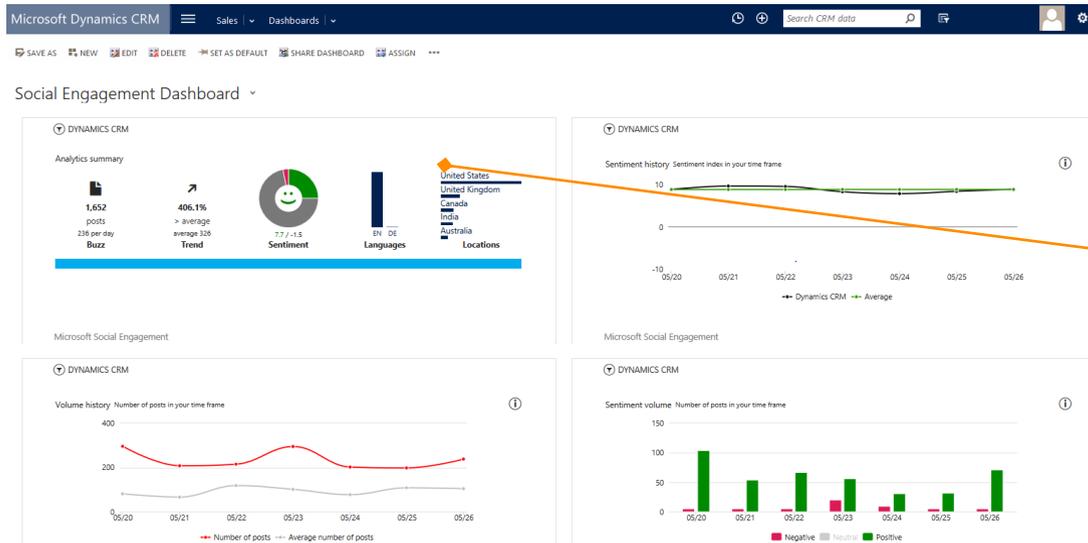
There are two places where you can see the Social Engagement visuals in CRM:

- Dashboards
- Forms (account, contact, or competitor forms or on other types of records, depending on how your system is set up)

For our example, first we'll add the **Analytics Summary** visual to a dashboard.



# add a Social Engagement visual to a new dashboard



The **Analytics Summary** is a good place to start because it gives you a quick summary of the number of posts, how your search topics are trending, and the breakdown of positive, negative, and neutral posts.

You can also see which languages are used most often for posts.

First, because we want to monitor the social conversation right away when we sign in, we'll add the summary visuals to a new dashboard.

## Tip

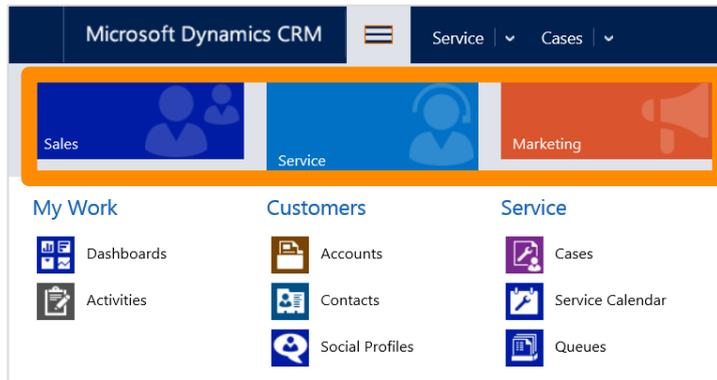
At the end of this eBook, we've included a [section](#) that shows you all of the visuals that are available. Feel free to use one of those, if you like. You follow the same basic steps to add any visual to a dashboard.



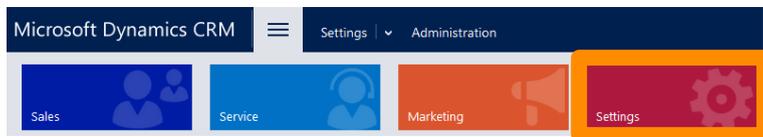
# navigate to your area

If your screen looks like this (latest version):

On the nav bar, choose **Sales, Service, or Marketing.**



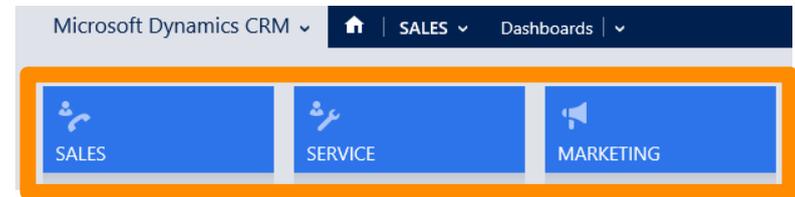
**If you're the CRM admin at your organization,** and you want to create a dashboard that everyone can use, on the nav bar choose, **Settings.**



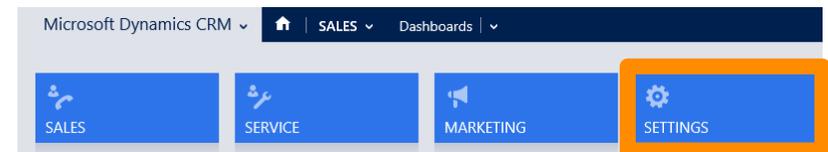
-OR-

If your screen looks like this (older versions):

Choose **Microsoft Dynamics CRM > Sales, Service, or Marketing.**



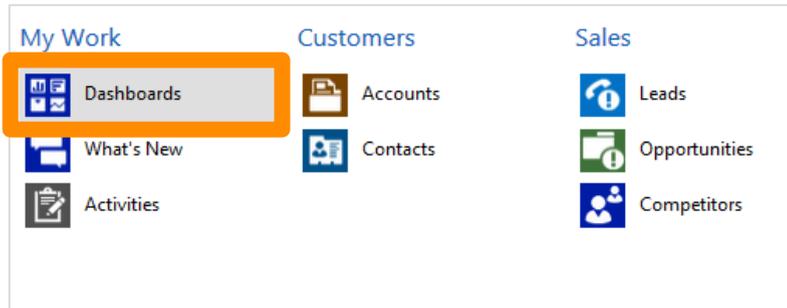
**If you're the CRM admin at your organization,** and you want to create a dashboard that everyone can use, choose **Microsoft Dynamics CRM > Settings.**



# go to dashboards

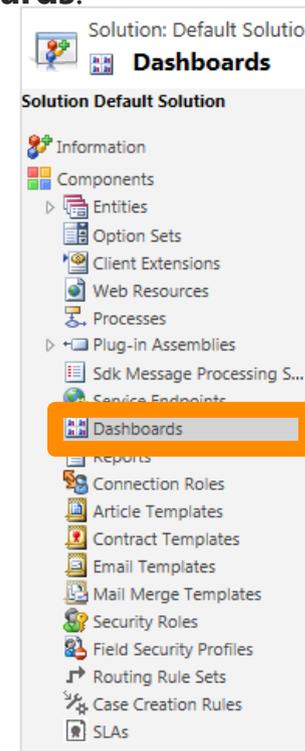
Admins and end users can set up their own dashboards.  
Optionally, admins can create new dashboards and share them with other users.

**If you're in sales, service, or marketing,**  
and want to create a dashboard for yourself,  
choose **Dashboards**.



-OR-

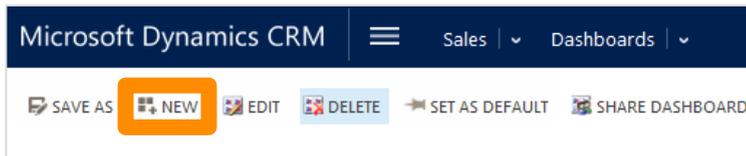
**If you're the CRM admin and want to  
create a shared dashboard,** choose  
**Customizations > Customize the System  
> Dashboards**.



# create a new dashboard

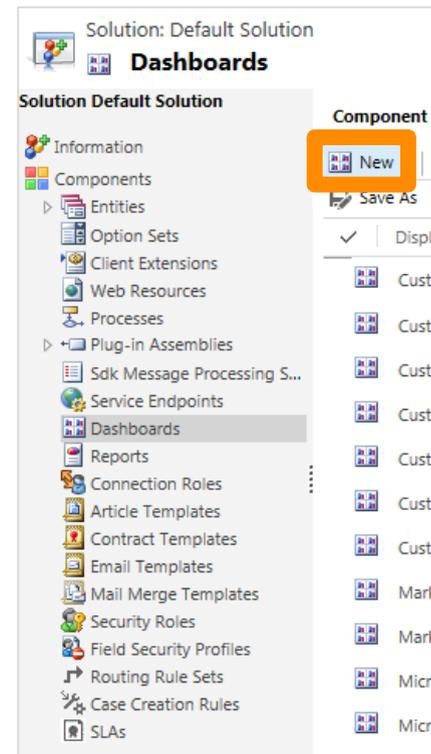
We'll create a new dashboard for Social Engagement.

**If you're in sales, service, or marketing,** choose **New** on the command bar.



-OR-

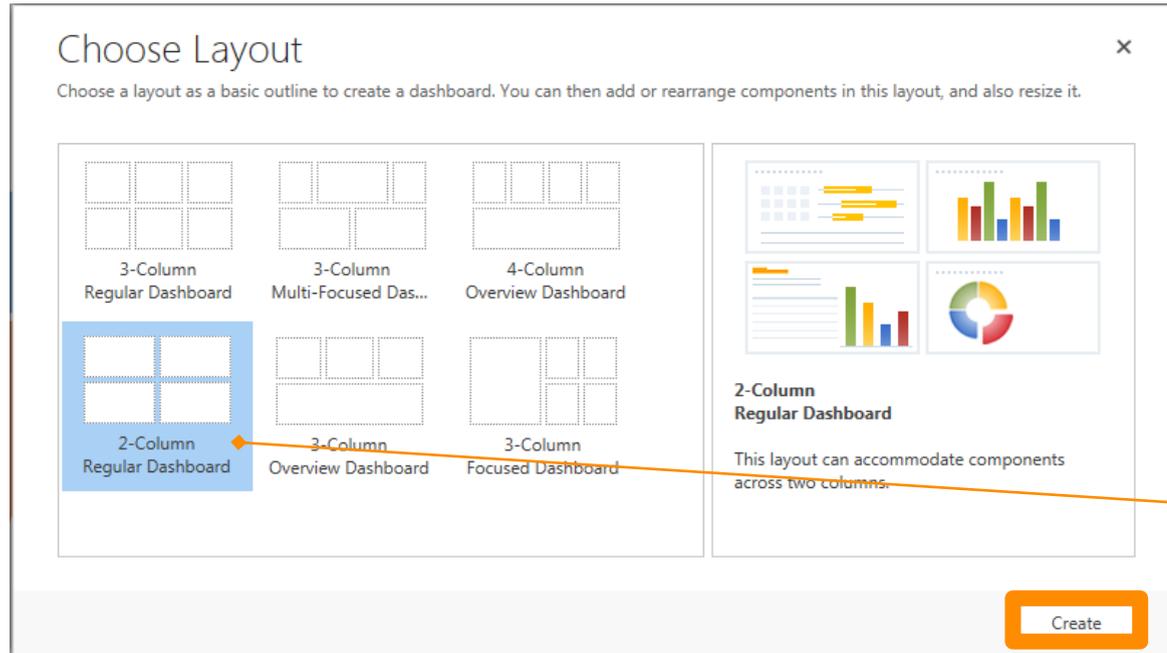
**If you're the CRM admin,** choose **New** on the toolbar.



**Note:** From here on out, the steps are the same for everyone.



# choose the dashboard layout



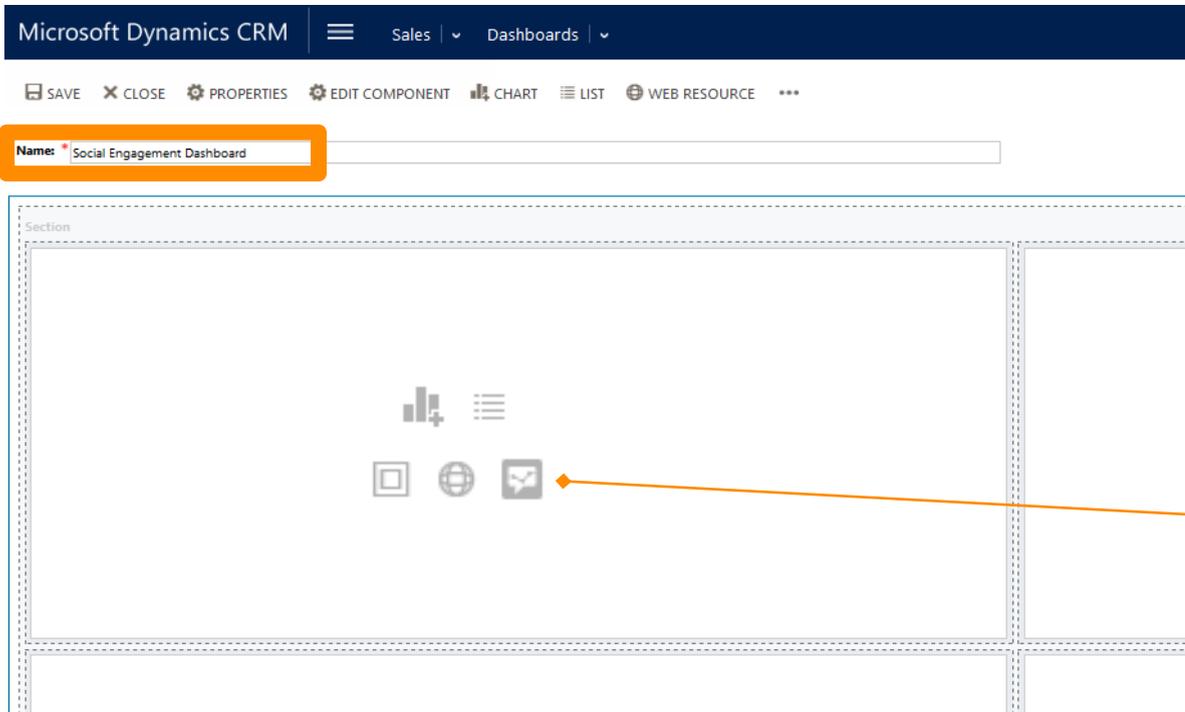
In our example, we'll choose the 2-column layout so that we can eventually include four Social Engagement visuals on the dashboard.

You can choose a different layout, if you like.

On the **Choose Layout** screen, choose **2-Column Regular Dashboard**, and then choose **Create**.



# start the Social Engagement wizard



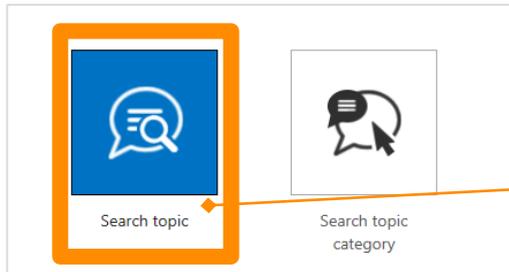
Type a name for the new dashboard.

Next, we need to decide on the search topics to listen for on social networks. The **Analytics summary** visuals will report on these topics. There's a wizard to help with that.

Choose **this icon** to start the wizard.



# add your search topics



Choose **Search topic**, and then select **Create a new search topic**.

You'll see a screen with fields to use for your own search topics.

- 1 Switch between selecting from a list of topics, or setting up your own.
- 2 Searches may be grouped by category (record type), such as for accounts, competitors, or contacts.
- 3 Enter keywords, separated by commas. Keywords are exact, but not case-sensitive. Include variations ("phone" and "phones").
- 4 Narrow your search by requiring these additional keywords in results (think "AND").
- 5 Use exclusions to avoid overwhelming your results with irrelevant keywords. Posts that also contain these keywords will be excluded (think "NOT").

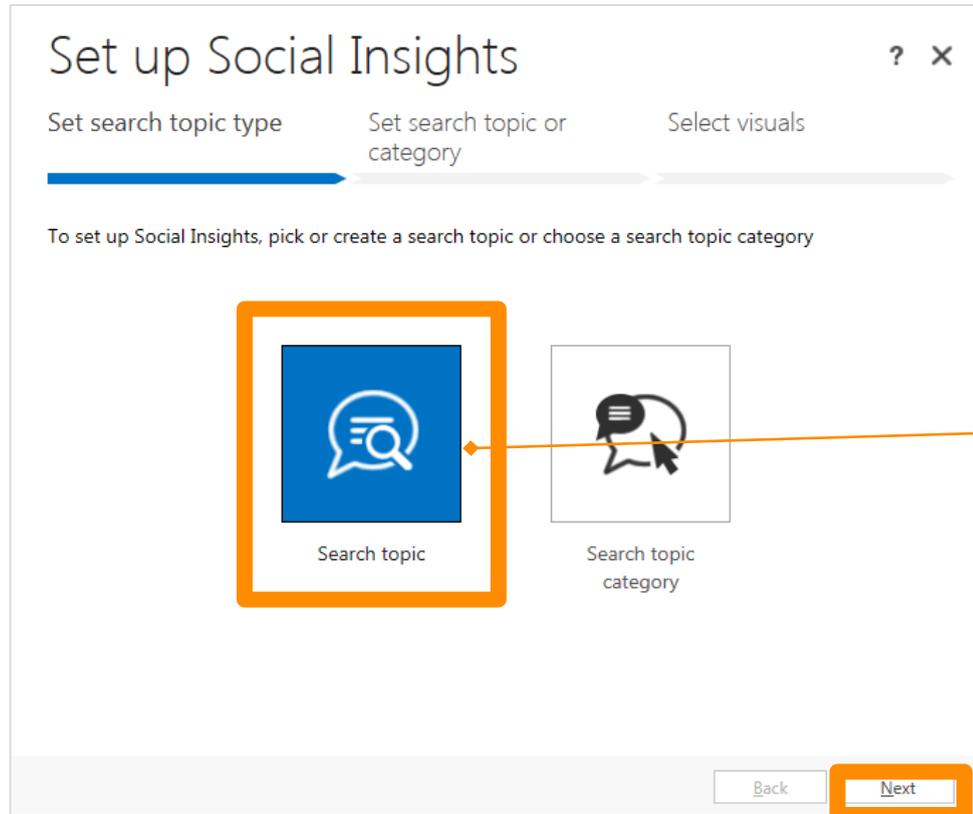
## Tip

To learn more about how to set up your own search topics, see [Set up searches to listen to social media conversations](#).

The screenshot shows a dialog box titled 'Set up Social Insights' with a progress bar at the top. The progress bar has three segments: 'Set search topic type', 'Set search topic or category' (which is highlighted with a blue arrow), and 'Select visuals'. Below the progress bar, there are two radio button options: 'Pick a search topic' and 'Create a new search topic'. The 'Create a new search topic' option is selected and highlighted with an orange box, with a '1' next to it. Below these options are several input fields: 'Name for this search topic \*' (with an empty text box), 'Select a category for this search topic 2' (with a dropdown menu showing 'Accounts'), 'Keywords to search for, separated by commas \* 3' (with an empty text box and an example 'Example: Microsoft, #microsoft'), 'Keywords that must be INCLUDED in results 4' (with an empty text box and an example 'Example: Office'), and 'Keywords that must be EXCLUDED from results 5' (with an empty text box and an example 'Example: buildings'). At the bottom, there are sections for 'Sources' (Blogs, Facebook, Twitter) and 'Languages' (en, de). A link at the bottom says 'Go to Microsoft Social Engagement for advanced setup options'.



# or, take advantage of pre-set search topics



To save time, a system administrator can set up search topics for your organization in advance.

Everyone shares them and can select from the same lists. For our example, we'll take advantage of these pre-set lists of search topics.

Choose **Search topic**, and then choose **Next**.



# select the search topic to listen for

## Set up Social Insights

? x

Set search topic type      Set search topic or category      Select visuals

Pick a search topic     Create a new search topic

Search topics list

Name	Keywords
Printer products	ink jet, laser printer, all-in-one, photo printer
Toner cartridges	remanufactured cartridges, refill kits
3D Computer-aided Design (CAD)	CAD software, wireframe, design modeling
Plotter products	flat bed plotter, drum plotter

Back    Next

Choose the search topic to listen for on social networks, and then choose **Next**.



# pick a visual

Set up Social Insights

Set search topic type      Set search topic or category      Select visuals

+ Add visual      TOPIC NAME: 3D Computer-aided Design (CAD)

Visual name	Description	Sample
1 Analytics summary	Get a quick summary of the number of posts, how your se	

↑ ↓ MOVE

Back      Finish

Because the visuals give a good overview of the results of the search, we'll pick the **Analytics summary**.

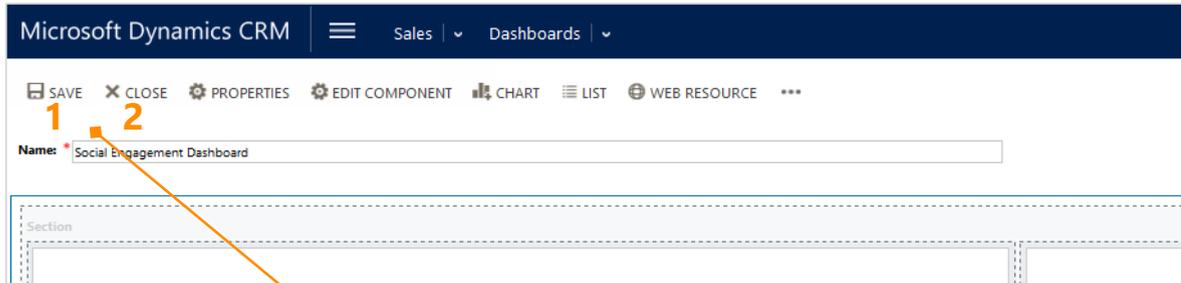
**Tip**

You can add more than one visual in this wizard.

Choose the down arrow, and then select **Analytics summary**. Choose **Finish**.



# save the dashboard and close

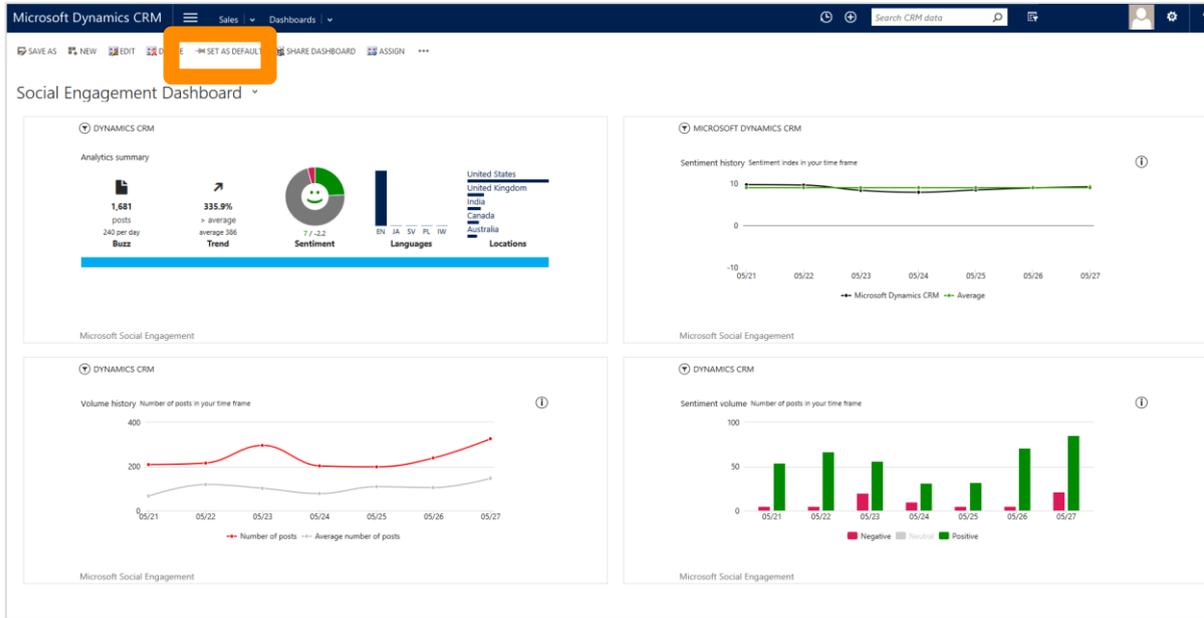


Choose **Save**, and then choose **Close**.

(Remember to choose **Save**, or you'll lose your changes.)



# get a quick snapshot of trends

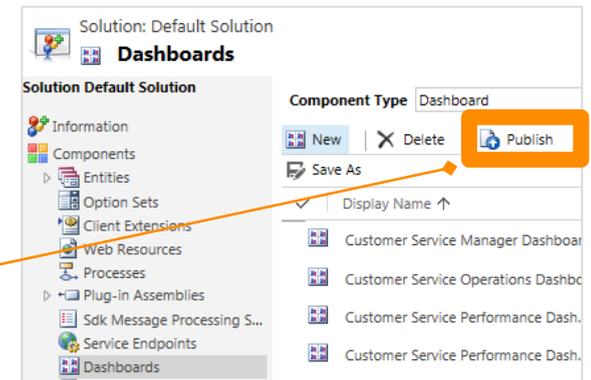


Depending on your search topics, it only takes a moment to see updated data in your Social Engagement visuals.

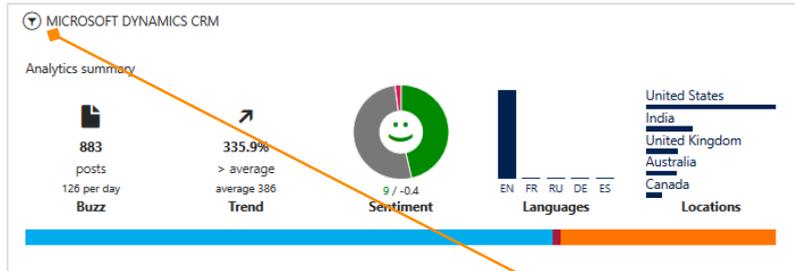
To get a quick snapshot that shows how your search topics are trending each time you sign in, choose **Set as Default** (it's at the top of the screen, on the command bar).

## Tip for CRM admins

Choose **Publish** so that others can view the dashboard.



# filter your visuals on the fly



## Filter options

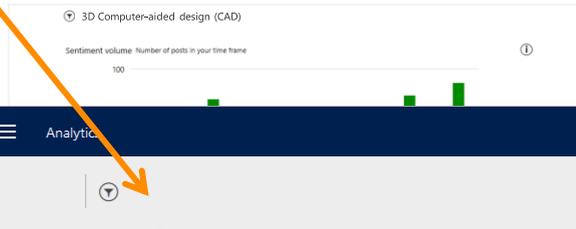
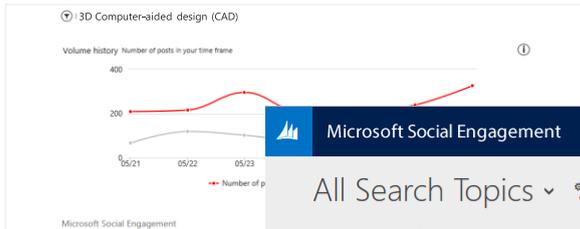
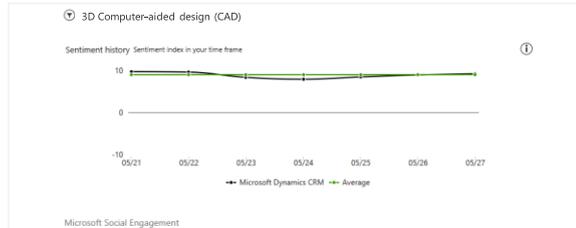
Depending on how your search topics are set up, you can choose the Filter button (⌵) and change the time frame, the languages, and the sources. This constructs the data set for the visual you are looking at and lets the visual adapt to your selection.



# from CRM to Social Engagement



Social Engagement Dashboard ▾



When you choose any of the Social Engagement visuals in CRM, a new window or tab opens that takes you to the Social Engagement application. Here you can drill further in to the data.

Microsoft Social Engagement | Analytic

All Search Topics ▾

Week 05/20 - 0... | 1.9k posts | +442%

Overview | Conversations | Sentiment | Location | Sources

LOCATION INSIGHTS

NORTH AMERICA | EUROPE | ASIA | AFRICA

AUTHORS BY SOURCE

- 700 authors (Twitter)
- 153 authors (LinkedIn)
- 3 authors (Facebook)

856 authors

VOLUME

Volume | Average

400 | 300 | 200 | 100 | 0

20 May | 21 | 22 | 23 | 24 | 25 | 26

PHRASES

#jobs business first now new online  
dynamics crm crm ax developer  
can microsoft dynamics will team  
one help microsoft dynamics crm  
microsoft dynamics ax

SEARCH TOPICS

- Accounts 1,652
- Products 798



# add a visual to an account form

For our next example, see how to add the Analytics summary to the account form.

The screenshot displays the Microsoft Dynamics CRM interface for an account named "Blue Yonder Airlines (sample)". The account information is as follows:

ACCOUNT INFORMATION	
Account Name	Blue Yonder Airlines (sample)
Phone	555-0154
Fax	--
Website	<a href="http://www.blueyonderairlines.com/">http://www.blueyonderairlines.com/</a>
Parent Account	--
Ticker Symbol	--

The address is listed as 9068 Muir Road, Los Angeles, CA 20593.

The "Social Insights" section, provided by Microsoft Social Engagement, includes an "Analytics summary" with the following data:

Metric	Value	Comparison
Posts	798	114 per day
Buzz	406.1%	> average
Trend	8.9 / -0.6	average 326
Sentiment	8.9 / -0.6	
Languages	EN, DE	



# go to accounts

You can add any of the visuals to the screen for your top accounts.

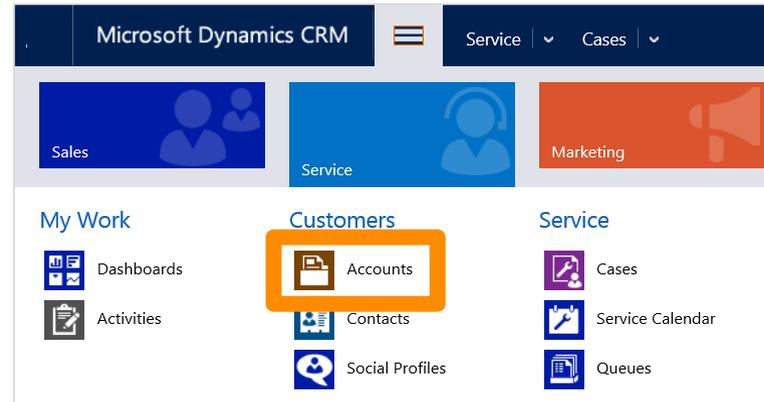
## Tip

Depending on how your system is set up, you may also be able to use Social Engagement for contacts, leads, competitors, or other types of records.

-  Accounts
-  Contacts
-  Leads
-  Opportunities
-  Competitors

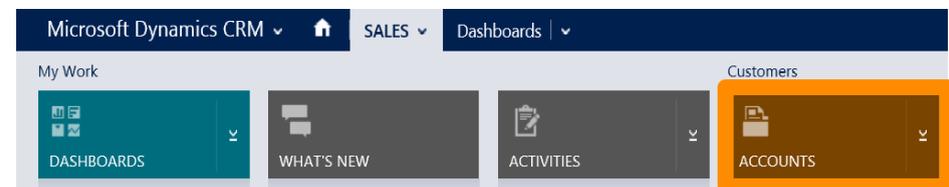
If your screen looks like this (latest version):

On the nav bar, choose **Sales, Service, or Marketing > Accounts**.



If your screen looks like this (older versions):

Choose **Microsoft Dynamics CRM > Sales, Service, or Marketing > Accounts**.



# select an account

Microsoft Dynamics CRM | Sales | Accounts

+ NEW | DELETE | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL | IMPORT DATA | CHART PANE | ...

My Active Accounts

Account Name ↑	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com
Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	someone_e@example.com
City Power & Light (sample)	555-0155	Redmond	Scott Konersmann (sample)	someone_f@example.com
Coho Winery (sample)	555-0159	Phoenix	Jim Glynn (sample)	someone_j@example.com
Contoso Pharmaceuticals (sample)	555-0156	Redmond	Robert Lyon (sample)	someone_g@example.com
Fabrikam, Inc. (sample)	555-0153	Lynnwood	Maria Campbell (sample)	someone_d@example.com
Fourth Coffee (sample)	555-0150	Renton	Yvonne McKay (sample)	someone_a@example.com
Litware, Inc. (sample)	555-0151	Dallas	Susanna Stubberod (samp...	someone_b@example.com

Choose the account name.

In our example, we'll add the **Analytics Summary** to Blue Yonder Airlines, so that we're up on the latest social trends before we contact them.



# choose the link to start the wizard

Microsoft Dynamics CRM | Sales | Accounts | Blue Yonder Airline...

+ NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN | EMAIL A LINK | DELETE | ...

ACCOUNT  
Blue Yonder Airlines (sample)

### Summary

**ACCOUNT INFORMATION**

Account Name *	Blue Yonder Airlines (sample)
Phone	555-0154
Fax	--
Website	<a href="http://www.blueyonderairlines.com/">http://www.blueyonderairlines.com/</a>
Parent Account	--
Ticker Symbol	--

Social Insights

**Configure Social Insights**

Next, we need to decide on the search topics to listen for on social networks for this account.

Choose **Configure Social Insights** to start the wizard.

(The link might be in a different location on your screen.)

#### Tip

If you don't find the link at all, ask your system administrator to add the Social Insights component to the form.



# take advantage of pre-set search topics

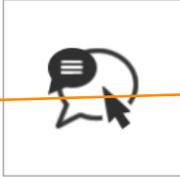
## Set up Social Insights

Set search topic type    Set search topic or category    Select visuals

To set up Social Insights, pick or create a search topic or choose a search topic category



Search topic



Search topic category

[Back](#)    [Next](#)

To save time, a system administrator can set up lists of common search topics for your accounts in advance.

Everyone shares them and can select from the same lists. For our example, we'll take advantage of these lists, instead of setting up our own search topics.

Choose **Search topic**, and then choose **Next**.

### Tip for advanced users

You can also set up your own search topics to listen for on social networks, if you want. There's [an example showing you how](#) in this eBook.

To make use of all options when you set up a search topic, we recommend that you choose the Advanced option and work directly in Social Engagement.



# select which topic to listen for

## Set up Social Insights

? x

Set search topic type      Set search topic or category      Select visuals

Pick a search topic     Create a new search topic

Search topics list

Name	Keywords
Printer products	ink jet, laser printer, all-in-one, photo printer
Toner cartridges	remanufactured cartridges, refill kits
3D Computer-aided Design (CAD)	CAD software, wireframe, design modeling
Plotter products	flat bed plotter, drum plotter

Back    Next

Choose the topic to listen for on social networks, and then choose **Next**.



# pick a visual

## Set up Social Insights

Set search topic type      Set search topic or category      Select visuals

+ Add visual      TOPIC NAME: 3D Computer-aided Design (CAD)

Visual name	Description	Sample
1 Analytics summary	Get a quick summary of the number of posts, how your se	

↑ ↓ MOVE

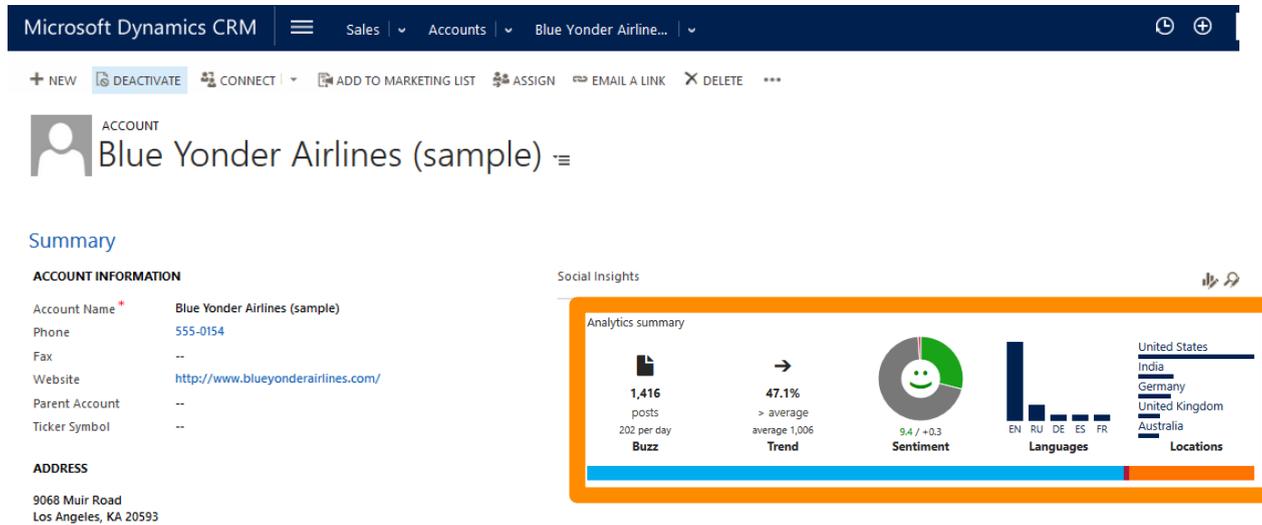
Back      Finish

Because the visuals give a good overview of the results of the search, we'll pick the **Analytics summary**.

Choose the down arrow, and then select **Analytics summary**. Choose **Finish**.



# know the scoop before you contact someone



Now you'll know that the buzz volume is really high compared to the average.

Something must be going on with your account – better find out before you call.

It's easy to do so! Choose one of the widgets to access the same data in Social Engagement. There, you can use powerful filters, read posts, and engage with others.



# Social Engagement visuals

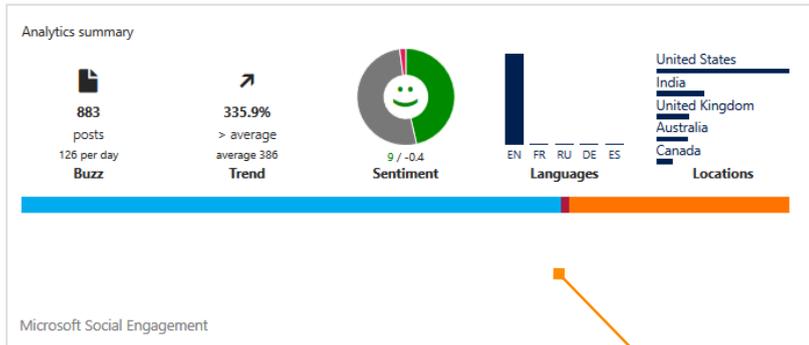
This section gives you an example of each Social Engagement visual, and some ideas about how to use each one.

Back to [contents](#).

Back to [adding a visual to a dashboard](#).



# get a summary of posts



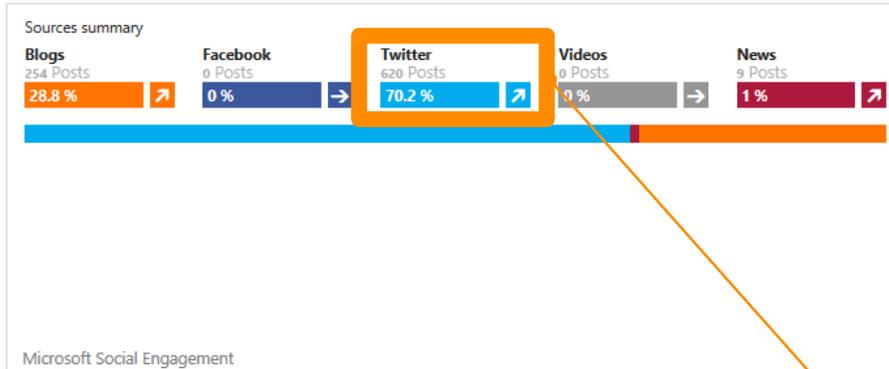
## Analytics summary

Get details about how many posts are showing up, and how the search topic or category you're interested in is trending.

You'll also see the sentiment that is being associated with your topic, the languages used to discuss your topic and the countries/regions found most often in this topic or category.



# compare social sources



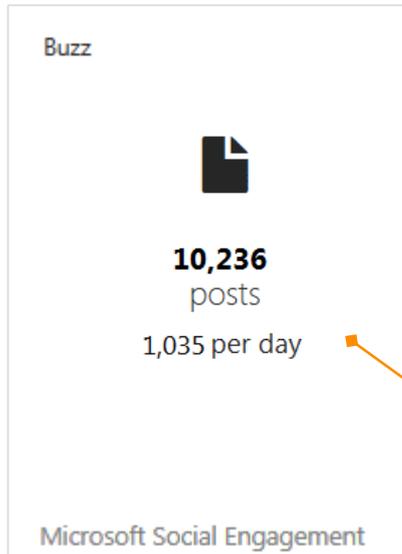
## Sources summary

Compare where the posts are coming from. Quickly check sources like blogs, Facebook, Twitter, News, and videos.

Choose an area on the visual to see more details in Social Engagement.



# check the daily buzz



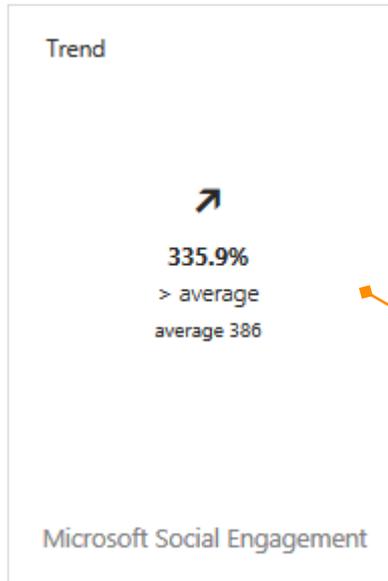
## **Buzz report**

Check the buzz on your search topic or category. See the total number of posts and the average number of posts per week. (You can also choose a different time frame.)

The Buzz report helps you keep track of the volume of posts overall on all active sources for your search topics.



# see how the buzz is trending



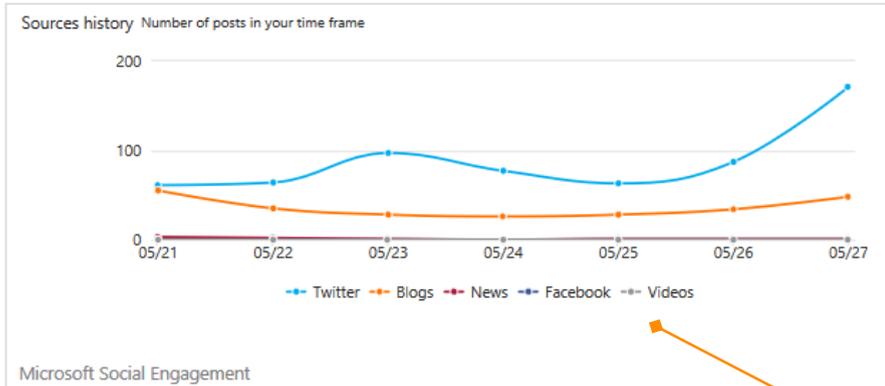
## **Trend report**

See how the number of posts is trending over time.

The Trend change compares the past five time frames (days, weeks, or months) to the most current time frame.



# see the post volume among sources



## Sources history

See which sources the posts are coming from. Find out quickly if a specific source is creating significantly more buzz than others and requires in-depth investigation.



# compare where posts are coming from

Sources



883 posts

Microsoft Social Engagement



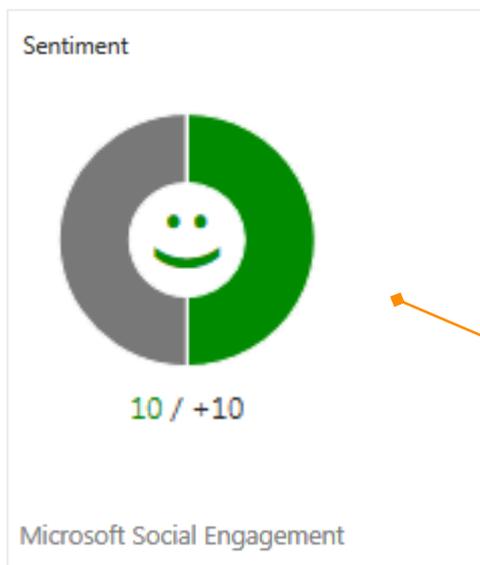
## Sources Share of Voice

See a visual that compares where the posts are coming from, and shows you which sources are the most active.

In this example, most of the posts are from Twitter, a significant number are from Blogs, while News, Videos, and Facebook posts are rarely found.



# compare the number of positive, negative, or neutral posts



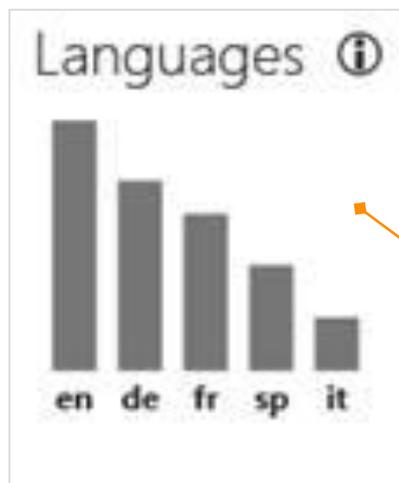
## Sentiment Share of Voice

See a visual that compares the positive, negative, or neutral posts in your search topics.

In this example, all posts are either positive or neutral, which results in a sentiment index of 10. This is an increase of +10 since last week.



# see the top 5 languages with the most posts



## Languages

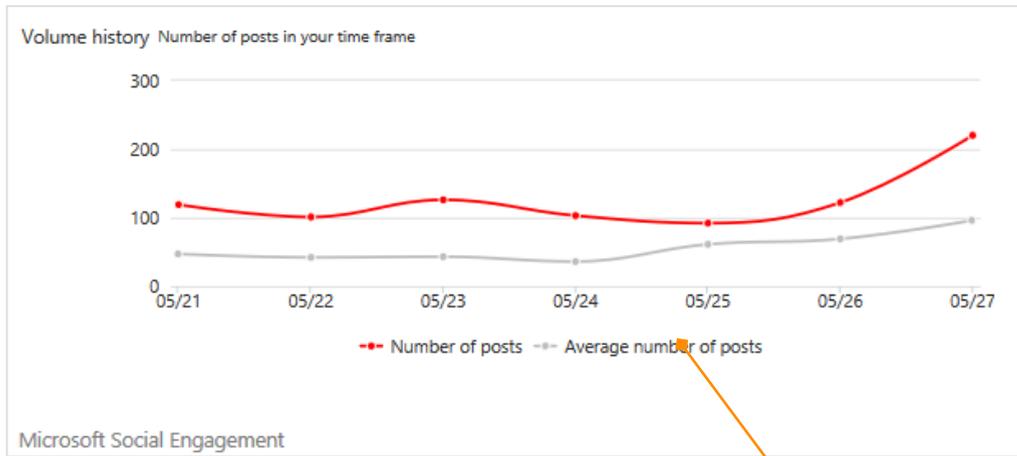
See the top 5 languages with the most posts about your search topic or category.

At a glance, see which languages were used the most for posts about your search topics.

en English  
de German  
fr French  
sp Spanish  
it Italian



# see peaks and valleys in volume over time

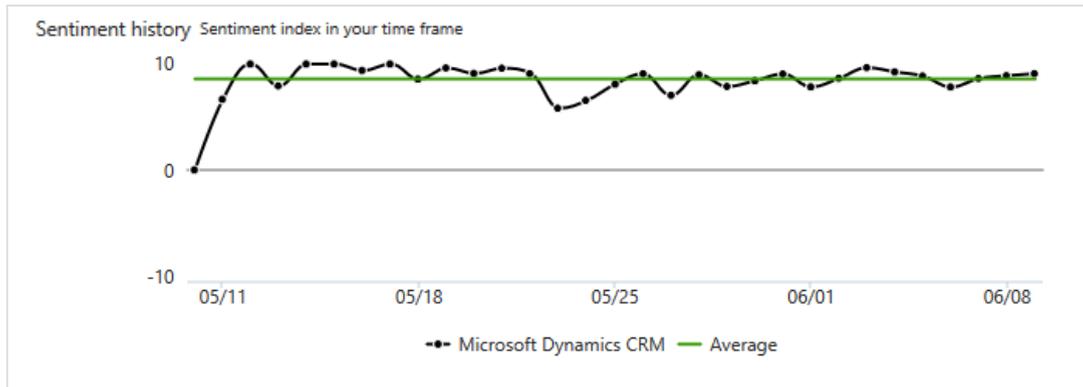


## Volume history

See peaks and valleys in the volume of posts for all sources over time. Identify important events at a glance and drill in to see more details about what happened.



# see when changes in sentiment occurred



## Sentiment history

Correlate sentiment about the search topic with dates and events.

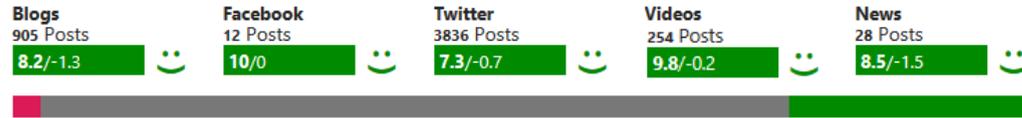
The black line indicates the sentiment index.

The green line indicates the average sentiment index in your time frame.



# see how sentiment varies among sources

Sentiment summary by sources



Microsoft Social Engagement

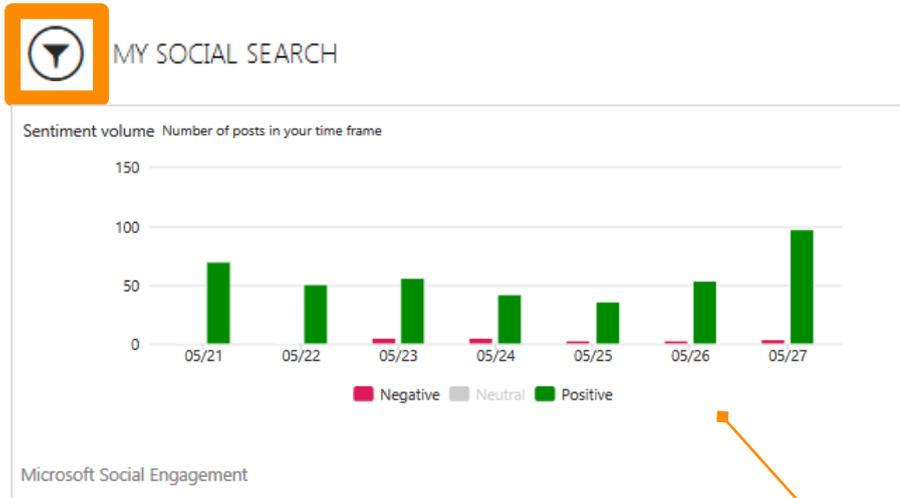
## Sentiment summary by sources

See how the sentiment varies among sources. Are posts on Facebook trending positive while Twitter is neutral?

In this example, most of the posts in the past week are on Twitter, and they're mostly positive.



# compare the number of positive and negative posts



## Sentiment volume

See a bar graph comparing the number of positive and negative posts.

This example shows the data by day, but you can also see weekly or monthly comparisons.

Choose the Filter button  at the top of the visual to select a different time frame.



# read public posts

Recent posts ⓘ

---

  Anyone get the same offer from Contoso? http://t...  
23:55 05/27/2015 PT 

---

 How long would it take them to ship this to me in Fairbanks? http://t...  
23:39 05/27/2015 EN

---

  Anyone get the same offer from Contoso? http://t...  
23:35 05/27/2015 EN 

---

  How long would it take them to ship this to me in Fairbanks? http://t...  
23:34 05/27/2015 EN 

---

  Anyone get the same offer from Contoso? http://t...  
23:23 05/27/2015 RU 

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## Recent posts

See an excerpt of the 5 most recent posts. Drill in to Social Engagement to take action and respond to these posts.



# see key influencers

Top 5 authors			
			
davidliu (David Liu)	2	33.3%	
joehealy (Joe Healy)	1	16.7%	
bobgage (Bob Gage)	1	16.7%	
ellynkya (Elly Nkya)	1	16.7%	
franklee (Frank Lee)	1	16.7%	

## Key influencers

See which people are mentioning your search topics the most. You'll find details about the number of posts, the author's share of voice, and the trend change.



# More resources

To find more information, visit:  
[Social Engagement Help Center](#)

Quick links to more training resources:

- [Connect Dynamics CRM with Social Engagement](#)
- [eBook: Introducing Microsoft Social Engagement](#)
- [eBook: Set Up a Social Engagement Search for Your Product](#)
- [Video: Get started with Social Engagement \(3:36\)](#)
- [Video: Microsoft Social Engagement Overview \(3:55\)](#)
- [Video: Microsoft Social Engagement Analytics \(7:23\)](#)

The screenshot shows the Microsoft Social Engagement Help Center interface. At the top, the Microsoft logo and "Social Engagement Help Center" are displayed. A search bar on the right contains the text "Search Help & Communities". Below the header is a large image of three people (two men and one woman) sitting at a desk with laptops, with a "Help & Training" overlay and a right-pointing arrow. To the right of the image are two dark green tiles: "Videos & eBooks" with a network icon and "Social Engagement Forum" with a speech bubble icon. At the bottom are three icons: a video camera labeled "Videos", three people labeled "Community", and a wrench labeled "Support".

Back to [contents](#).



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Version 3.0





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