




Live Webinar | 27.02.2024 | 11:00-12:00


CRM Integration with RaiseNow Management 101: Hands-On Training for more Efficiency and Control





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



Q&A

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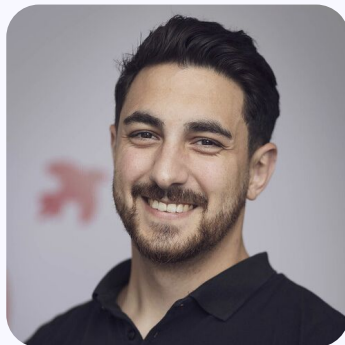


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At the end of this session, you will be able to:

- Be familiar with the management of your CRM integration with RaiseNow
- Know what and where to find Business Processes
- Know how to solve failed Business Processes
- Have a monitoring system in place for early warning

What you need for this session

Access for Customers & Partners: <https://merchantadmin-app.rnw.io/>

Vocabulary:

- RICE: **R**aiseNow **I**ntermediary for **C**ustomer **E**ngagements (“CRM Connector”)
- BP: **B**usiness **P**rocess (Entity for executing the transfer to target system)

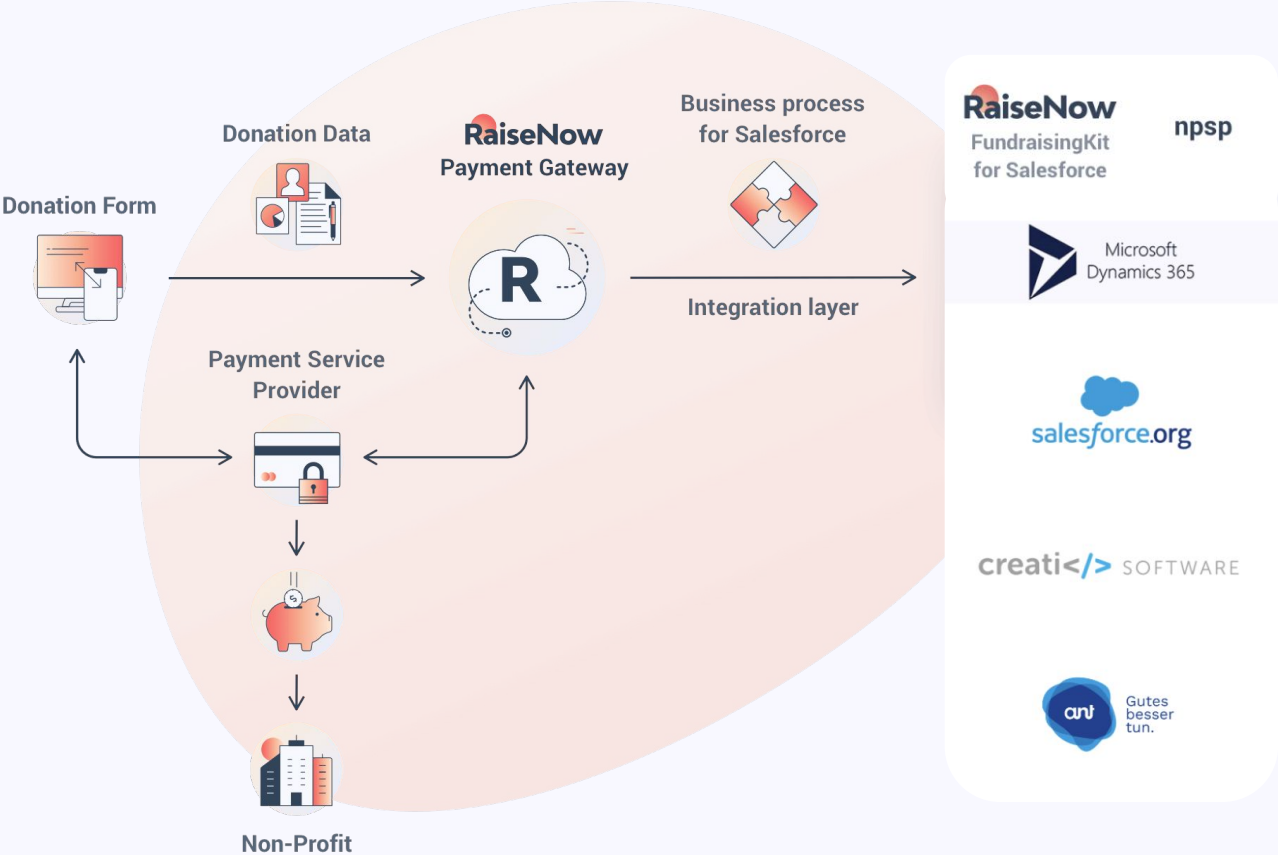
Ressources: [Our Knowledge Base](#)

RaiseNow partners

- System Integrator (SI)
- CRM Providers
- Web agencies
- Fundraising consultants
- F2F agencies



➤ [Connect with a RaiseNow partner](#)



Business Process (BP) - Core

- **Identifiers**
 - BP has an unique identifier
 - BP has an external identifier (n:1 “many BPs can have the same external identifier”)
- **Status Categories**
 - Execution Succeeded; Failed Permanently; Failed Transiently; Failure Ignored; Manipulation Failed; Non Executable; Execution Pending; Update Requested; Resumption Requested
- **Data Categories (2 Instances per Organization)**
 - Non-production & production
 - No prevention of sending data from RaiseNow production instance to CRM test Instance (or other way around)
- **Source/Destination**
 - Defining from which source-app the notification was triggering and against which destination a BP is executed

Business Process (BP) - Process details

- **Process Types**
 - Vary between different target systems RaiseNow is supporting.
 - A process type defines how to process a specific business case within your target system.
- **Notification**
 - Can have various forms depending on the source.
- **Specification Invocations**
 - The steps that were invoked, along with their status and result.
- **Tools**
 - Edit: to simply let re-execute the BP, notification is editable beforehand
 - Ignore Failure: If solved elsewhere (for instance by manual transfer) or to simply ignore a failed BP
 - View History: To see execution and status changes on one BP (with date/time and user triggering)

DEMO

What does intermediate and final status mean?

Name	Description	Intermediate status?	Action
Failed Permanently	Final status for failed BP	No	Try to fix it by re-execution or by editing the BP notification data
Manipulation Failed	BP Specification differs from a previous version, thus the manipulation (edit, re-execution) failed	No	Let RaiseNow Support know if transfer to target system is needed
Non Executable	Test mode BP in production (or other way around) or duplicated notification	No	Nothing
Failure Ignored	Explicitly ignored failed BP	No	Can be edited and re-executed if needed
Execution Succeeded	Final status for successful BP	No	Can't be edited or re-executed
Execution Pending	BP is just in processing	Yes	Wait
Update Requested	BP update was requested (after editing notification data)	Yes	Wait
Resumption Requested	BP re-execution was requested (without editing notification data)	Yes	Wait
Failed Transiently	Failed BP with automatic-retry	Yes	Wait

What to do with failed BPs - Clustering

1. Filter by status → understand what status is important for you
2. Check which data type: non-prod / prod → only care about prod BPs
3. Check the timeframe of the failed BPs
4. Check a BP in detail and identify the problem
5. Use search field to cluster the failed BPs
 - Example: **Message: String is not an email address as it is missing an @ sign**
 - Search: **"not an email"** → get all BPs with this error
 - You can also filter out BPs with this error: **!"not an email"** (! ≡ “not”)

What to do with failed BPs - Checklist

Analyze the business process


- **Type → Business Case**
 - Do I need that information in my CRM?
 - How urgent is it?
- **Error message**
 - Is it from CRM, external tool or RICE?
- **Processed steps**
 - At which step did the BP stopped?
- **External identifier**
 - Which external object is involved?
- **BP history**
 - Was it failed transiently before?
 - Did someone already tried to resend it?
 - Did notification data change?



What to do with a failed BPs - Checklist

Error classification

- CRM Issue?
 - Inform SI/CRM provider (if needed)
 - Common: API limit, “not Found”, flow errors, validation errors
- Touchpoint Issue?
 - Inform web- or F2F-agency (if needed)
 - Common: Campaign invalid, parameter/field not set or invalid
- Further help needed?
 - RaiseNow Support
 - Common: Manipulation failed after RICE Upgrade, Bulk processing
- Bug or feature request?
 - RaiseNow Support



With updates on our integrations we try to enhance the automatic failure resolution.

DEMO

Setting up your BPs monitoring

1. You can received email notifications for failed BPs (OCN) → share the email address with support@raisenow.com
2. We recommend you set up a process internally with your team and your integrator
3. Make sure everyone on your team is armed with the knowledge on BPs
4. When an issue arise and you have **checked all previous steps**, you can contact us at support@raisenow.com. Please make sure to share the **BP URL** for quicker solving and no screenshots

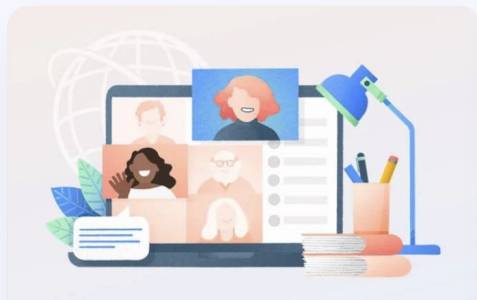


Thank you for your attention!

Our goal is to make sure you have a successful CRM integration with RaiseNow systems, therefore we are available for you at **support@raisenow.com**.

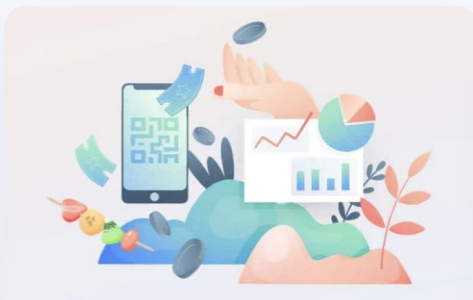


Ressources



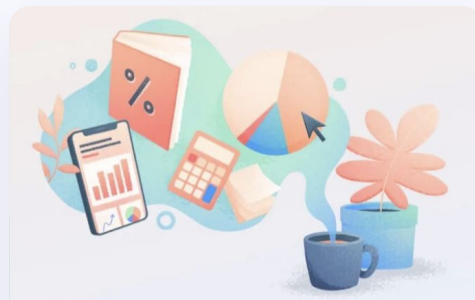
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