



Engaging Connections technical specification sheet (Jan 2023)

engagingconnections.org

Table description	Subscriptions this item is included in	Plain English description	Direction	Technical description (including any specific elements of Engaging Networks and MS Dynamics)
Two way Integration	Standard, Campaign, Pro, Enterprise	Automatic synchronisation between Engaging Networks and Microsoft Dynamics	N/A	Synchronise specific data in two-directions between Engaging Networks and Microsoft Dynamics 365.
Preferences & Opt-ins sync	Standard, Campaign, Pro, Enterprise	Comply with GDPR and keep user consent preferences up to date	Bi-directional	Engaging Networks opt-ins (stored as supporter questions) are synchronised with Microsoft Dynamics marketing lists or Contact fields, based on the initial field mapping which is configured during client onboarding. Data is exported from Engaging Networks the following day and from Microsoft Dynamics updates are synchronised the same day as changes are made.
Syncing user details	Standard, Campaign, Pro, Enterprise	Automatically update contact details in both systems	Bi-directional	Changes to supporter fields in Engaging Networks and their corresponding fields in Microsoft Dynamics contacts are synchronised, based on the initial field mapping which is configured during onboarding. Data is exported from Engaging Networks the following day and from Microsoft Dynamics updates are synchronised the same day as changes are made.
Email dedupe	Standard, Campaign, Pro, Enterprise	Remove manual de-duping of lists and data download work-arounds	N/A	By automatically matching email address between Engaging Networks and Microsoft Dynamics, we avoid creating duplicate supporter or contact records in either system.
Actions sync	Campaign, Pro, Enterprise	The ability to sync and compare advocacy actions between both systems	Engaging Networks to Microsoft Dynamics 365	Actions recorded on Engaging Networks like signed petitions are sent to Microsoft Dynamics as contact activities. These are sent to Microsoft Dynamics the following day.



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Donations sync	Campaign, Pro, Enterprise	Track donations across all channels against user records	Engaging Networks to Microsoft Dynamics 365	Donations recorded on Engaging Networks are sent to Microsoft Dynamics as opportunities. These are sent to Microsoft Dynamics the following day.
Questions sync	Campaign, Pro, Enterprise	Give your CRM sight of all data held as questions and ensure that granular information can be used	Bi-directional	Engaging Networks supporter questions are synchronised with Microsoft Dynamics marketing lists or Contact fields, based on the initial field mapping which is configured during onboarding. Data is exported from Engaging Networks the following day and from Microsoft Dynamics updates are synchronised the same day as changes are made.
Conflict handling	Pro, Enterprise	Triage conflicting entries into a MS Dynamics Task List to focus manual review to improve accuracy	Engaging Networks to Microsoft Dynamics 365	Where supporters/contacts use the same email address, but different names/addresses, synchronisation can flag these to be merged as a single household etc.
Proper casing	Pro, Enterprise	Get data merge field ready with correct grammar	Bi-directional	As data is transferred between Engaging Networks and Microsoft Dynamics, field-level transformations can be applied to automatically correct inconsistent casing, unusual whitespace or unexpected input on key supporter/contact fields for name, address, and telephone numbers.
Email verification	Pro, Enterprise	Don't let simple typos prevent email collection	Bi-directional	As data is transferred between Engaging Networks and Microsoft Dynamics, email addresses are validated, and where obvious rules are broken they can be corrected automatically.



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Donation reconciliation lists	Pro, Enterprise	Get donor lists based on appeal codes for easier reconciliation processes	Engaging Networks to Microsoft Dynamics 365	For each donation from Engaging Networks, the campaign page ID can be stored in Microsoft Dynamics against the opportunity, allowing finance teams to correctly attribute donations within the organisation to the correct campaign.
Up to 500,000 Engaging Networks users	Standard, Campaign, Pro	Up to 500,000 Engaging Networks users	N/A	Up to 500,000 Engaging Networks users
Over 500,000 Engaging Networks users	Enterprise	Over 500,000 Engaging Networks users	N/A	List sizes over 500,000 are categorised as an Enterprise subscription, each contract is worked out on a case-by-case basis.
Platform management services	Standard, Campaign, Pro, Enterprise	Platform management includes GDPR compliant and secure hosting, managed offsite backup, release management, roadmap release planning, ongoing service monitoring & outage rectification within working hours.	N/A	The middleware is a fully managed service, provided as-is, with security, availability, maintenance, new features and monitoring managed by NDP.
Strategic management services	Standard, Campaign, Pro, Enterprise	This includes the opportunity to attend data strategy events and to provide feedback on the technical product roadmap.	N/A	Activities may include online and offline events, hand raising events and online feedback surveys. No minimum number is agreed to per year.



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Schedule of transfers	Standard, Campaign, Pro, Enterprise	How and when synchronisation activities take place	Bi-directional	Supporter changes within Engaging Networks are processed the same day, hourly. Actions and donations from Engaging Networks are processed daily. Each day runs from 5am UTC to 4:59am. Data transfer begins after 8am UTC for the previous day's data transfer and is sent to Microsoft Dynamics throughout the day. Synchronisation time varies based on the volume of changes and is constrained by Microsoft Dynamics API rate limits. Changes from Microsoft Dynamics are queued the same day that they are made and processed within rate limits - typically data transfer will begin within a few minutes of the change being made.
Bespoke two way Integration	Enterprise	Automatic synchronisation between Engaging Networks and third parties	Bi-directional	Synchronise specific data in two-directions between Engaging Networks and third party systems (CRM, CDP, CXP, BI, payment and analytics tools)

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