

Dynamica RightMove Integration Solution E2E Scenario

Primary Persona:	CRM User
Configuration Settings	Client: Web Client (Browsers: Chrome, Firefox, Edge, IE, Opera); RightMove branch ID; CRM: 365;
Problem / Opportunity Statement:	The solution allows to take advantage of using RightMove property portal directly from Dynamics 365 as well as receive e-mail leads from the website and keep that information inside CRM. One can easily publish/update/remove listings to/from RightMove portal. Solution workflows monitor requests originating from the website and automatically unpublish expired listings.
Pain Points:	It is difficult to connect records inside CRM with listings on RightMove portal and keep track on potential customers requests;
User Goals:	Publish listings directly from Dynamics 365 and keep track on leads originating from RightMove website;
Business Goals:	Additional source of leads which is fully automated, smooth integration with property portal;
Triggers:	Navigate to RightMove Integration -> Properties , create property record; Navigate to RightMove Integration -> Listings , create listing record, add reference to previously created property, ensure that all required fields have correct values, then click Publish/Update Listing ; Once listing is published, click Unpublish Listing to remove it from the website; Deactivating or deleting listing, changing Listing Status to Closed or Other will cause removing it from the website; If Listing Expiration date is set, workflow will check it and unpublish listing if the date is overdue; Another workflow checks every 15 minutes for new website requests and creates Inquiries and Contacts if needed;

Narrative
Description (e.g.,
plans, evaluation,
actions, objects,
context, events):

The basic version of the solution will be distributed for free through appsource cloud portal.

Detailed Steps

1. Install the solution;
2. Assign user **RightMove Manager** security role;
3. If you want to proceed using this solution in “*Test Mode*” (all operations with property listings will be performed on RightMove test website), please, tick “**Test Mode**” checkbox on the solution configuration page, click **Save** and then go to **step 6** of current section (to get credentials for the test website contact Dynamica Labs support team).
4. Request **RightMove Branch ID** associated with Dynamica Labs feed from ADF support team (send e-mail to adfsupport@rightmove.co.uk);
5. Copy **RightMove Branch ID** (from the previous step), **RightMove Network ID** (10418) and **RightMove Service URL** (<https://adfapi.rightmove.co.uk/v1/property/>) to the solution configuration page and **Save**;
6. Navigate to **RightMove Integration -> Properties**;
7. Create new record, ensure required fields (**Property Name, Property Type**) are set and fields required for publishing to RightMove (**Bedrooms, Address Line 1, City, Zip/Postal Code**) have values.
NOTE: Only UK postal codes are accepted by RightMove portal;
8. Create **Media** record(s) related to the property record, choose **Media Type**, add note(s) with attachment.
NOTE: File types that can be uploaded to RightMove – jpg, jpeg, png, bmp, gif, pdf, mp3, wmv, avi. Other file type will be ignored;
9. Navigate to **RightMove Integration -> Listings**;
10. Create new record, ensure required fields (**Name, Sale or Lease, Listing Status**) are set and fields required for publishing to RightMove (**Summary, Full Description, Asking Price**) have values.
NOTE: Publish/Update Listing button appears only for listings that the following field values
Sale or Lease -> Sale, Lease, Sublease
Listing Status -> Active, Lease Pending, Sale Pending
Status -> Active;
11. Click **Publish/Update Listing** button, in case of success you will see dialog box with property listing URL, otherwise – dialog box with error description;
12. If the listing was successfully published **Unpublish Listing** button will appear, **Published to RightMove** changes to **Yes**, **RightMove URL** should contain URL address of the listing;
13. Click **Unpublish Listing** button, in case of error you will see dialog box with error description;
14. If the listing was successfully unpublished **Published to RightMove** changes to **No**, **RightMove URL** field cleared out;
15. If published listing is deactivated (**Status -> Inactive**) then it's being automatically unpublished;
16. If published listing **Listing Status** changes to **Closed** or **Other** then it's being automatically unpublished;

17. If published listing is deleted then it's being automatically unpublished;
18. In case published listing has **Listing Expiration** date set then it will be automatically unpublished on the date next to specified and **Listing Status** will change to **Closed**;
19. If someone requests details for the listing from RightMove website then within 15 minutes timeframe **Inquiry** and **Contact** records will be created (if there's already a contact in CRM with the same e-mail address, existing record will be picked and assigned to **Client (Inquiry)**);

Important Note: *Publishing/unpublishing listings, receiving leads from the website is possible only if correct RightMove Network ID, RightMove Branch ID and RightMove Service URL are set on the solution configuration page.*

Success Metrics:

1. **RightMove Integration** area appears in the navigation menu;
2. **Publish/Update Listing, Unpublish Listing** buttons appear on the **Listing** entity ribbon when conditions are met;
3. Published listings appear on RightMove website;
4. Unpublished listings are removed from RightMove website;
5. Listings become unpublished on specific events;
6. Listings become unpublished when they expire;