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User Manual

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Introduction

Marketing4Dynamics is a productivity app providing integration between Dynamics 365 CRM and Mailchimp. It syncs Mailchimp and Dynamics 365 CRM customers along with their marketing statistics data ensuring easy and quick access to information without navigating from one application to another. Complete details of campaigns and other member activities executed through Mailchimp is made available within Dynamics 365 CRM. This gives an advantage while planning and executing marketing activities and increases the productivity of Dynamics 365 CRM users.

Salient Features:

- Supports syncing of Audience and Tags of Mailchimp along with its members to Dynamics 365 CRM and map with CRM Marketing List.
- Supports syncing of CRM Marketing List and its members (Contacts/Leads) to Mailchimp.
- Supports syncing of Campaigns and members activities (Open, Sent, Click, Unsubscribed and Bounced) from Mailchimp to Dynamics 365 CRM
- Monitor and analyze statistics of Campaign sent to subscribers.

Available for: Microsoft Dynamics 365 v9.0 and above.

Deployment: Online.

Security Roles

Two Security roles are added with Marketing4Dynamics - Marketing4Dynamics Administrator and Marketing4Dynamis User. Any user who will be using Marketing4Dynamics should be assigned any one of these roles as this will drive the ability to see the Marketing4Dynamics Settings and forms where needed.

• Marketing4Dynamics Administrator – The user with Marketing4Dynamics Administrator security role is in charge of setting up and configuring the solution.

 Marketing4Dynamics User – The user with Marketing4Dynamics User security role will be in charge of working with members of Marketing List in CRM and will be able to view campaign statistics and marketing activities data synced from Mailchimp.

Here are the steps to assign security role to users.

• Go to Advanced Settings --> Settings --> Security.

	Dynamics 365 🗸	Settings ~ Bus	iness Management	
Se	ettings			
В	usiness	Customization	System	
2	Business Manageme	Customizations	administration	Email Configuration
Ľ	Templates	Solutions	Security	Activity Feeds Confi
	Product Catalog	Microsoft AppSourc	e 号 👸 Data Management	Activity Feeds Rules
۰	Service Management	← Plug-In Trace Log	System Jobs	Dynamics 365 App f
	Mobile Offline	Solutions History	Document Manage	Sales Insights
¢	Sync Error		Auditing	

Select Users.



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• Select user --> Click on MANAGE ROLES.



• Click on any one of the security roles --> Click Ok.

Role Name Business Unit Marketing Professional ajworks11 Marketing4Dynamics Administrator ajworks11 Marketing4Dynamics User ajworks11			
Marketing Professional ajworks11 Marketing4Dynamics Administrator ajworks11 Marketing4Dynamics User ajworks11	Role Name	Business Unit	
Marketing4Dynamics Administrator ajworks11	Marketing Professional	ajworks11	-
Marketing4Dynamics User aiworks11	Marketing4Dynamics Administrator	ajworks11	
]Marketing4Dynamics User	ajworks11	
Omnichannel administrator ajworks11	Omnichannel administrator	ajworks11	
Omnichannel agent ajworks11	Omnichannel agent	ajworks11	
Omnichannel supervisor ajworks11	Omnichannel supervisor	ajworks11	-

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Setup

In the 'Setup' area there are 4 sections – **Connect to Mailchimp, Sync Audiences, Sync Marketing List/Members, Sync Campaigns.** To avail the benefits of Marketing4Dynamics, these sections should be successfully setup.

Note: The user must have System Administrator or Marketing4Dynamics Administrator security role to configure or to complete the setup.

Connect to Mailchimp

To successfully connect Mailchimp account to Dynamics 365 CRM, follow the steps given below:

- III Dynamics 365 Marketing4Dynamics: Mailchimp Integ... Try the new look 💽 🖉 🗘 + 🛛 🍩 ? 🛱 Marketing4Dynamics - Mailchimp Integration all marketing information such as campaigns, member activities, Learn more Recent \sim Connect to Mailchimp Authenticate your Mailchimp Account in order to sync marketing List and Activities. Learn more 🖈 Pinned \sim My Works » Dashboards Connect to Mailchimp Account Edit settings Marketing Activities Choose Mailchimp audiences that you want to sync to Dynamics 365 CRM. Learn more Sync Audiences Manage > Customers A Contacts Sync Marketing List/Members Create new or use your existing Marketing list to sync members from CRM to Mailchimp. Learn more C Leads Manage > Marketing Sync Campaigns Choose Mailchimp campaigns that you want to sync to Dynamics 365 CRM. A Marketing Lists Manage > Campaigns Settings 🗘 Setup Audiences Tags
- First, go to Marketing4Dynamics App → Settings → Setup.

• Click on 'Connect to Mailchimp Account' \rightarrow A dialog box will appear.

Marketing4Dynamics - Mailchimp Integration Marketing4Dynamics helps to sync Marketing List and ensures that you have quick access to all marketing information such as campaigns, member activities, Learn more						
MC	Connect to Mailchimp Authenticate your Mailchimp Account Learn more Colgrect to Mailchimp Account	Connect to Mailchimp × Please fill out all of the fields to connect to your Mailchimp account				
	Sync Audiences Choose Mailchimp audiences that you Learn more	API URL Enter API URL	Manage >			
	Sync Marketing List/Members Create new or use your existing Marke Learn more	API Key Enter API Key	Manage >			
,	Sync Campaigns Choose Mailchimp campaigns that you Learn more	Need help? How to find your API URL and API key Connect To Mailchimp Cancel	Manage >			

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• Enter the <u>API URL and API key</u> in the dialog box \rightarrow Click on **'Connect to Mailchimp'**.

Connect to Mailchimp $\qquad \qquad \qquad$
Please fill out all of the fields to connect to your Mailchimp account
API URL
Important operation of a second
API Key
Land of the Action of the Acti
Need help? How to find your API URL and API key
Connect To Mailchimp Cancel

 When the connection is successfully established a dialog box will appear informing the same → Click on OK.



• Now the section will be indicated as 'Connected'.



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How to find API URL and API key?

To connect Mailchimp and Dynamics 365 CRM, API URL and API key from Mailchimp account is necessary. Follow the steps given below to obtain the same.

API Key:

• Log into the existing Mailchimp account or create a new account.

E	
Log In	
Need a Mailchimp account? Create an acc	ount
Username	
Password	Show
I'm not a robot	
Log In	
Keep me logged in	

• Go to Account \rightarrow Extras \rightarrow Click on **API keys**.



E	Wise Solutions	
	Overview Settings - Billing -	Extras V Integrations Shop New Plans
Ĵ.	API keys	API knys
」 公	About the API	Registered apps veloping an app?

Navigate to 'Your API keys' section. If you already have an API key listed and you would like to
use it, simply copy it for connecting to your Mailchimp account otherwise, click on 'Create A
Key' button.

Your API keys API keys provide full access to keeping API keys secure.	to your Mailchimp account, so keep	them safe. <u>Tips on</u>			
Created	User	Label	API key	QR Code	Status
Jul 22, 2021 7:26 am	Julie McWhorter (owner)	none set	HICCORPOLE/CONCUMPANEDS	QR	
Create A Key					

• The key will be created shortly. This will be the API key.

Your API keys						
API keys provide full access t <u>keeping API keys secure</u> .	to your Mailchimp account, so keep t	hem safe. <u>Tips on</u>				
Created	User	Label	API key	QR Code	Status	
Jul 22, 2021 7:26 am	Julie McWhorter (owner)	none set	00000010460000484460	QR		

API URL:

- Log into the existing Mailchimp account or create a new account.
- The general format of the API URL is like this https://{dc}.api.mailchimp.com/3.0/
- To get the {dc} for your URL, look at the URL in your browser. On the home page of Mailchimp, you'll see something like <u>https://us5.admin.mailchimp.com/</u>. Here, the us5 part is the server prefix (dc). Note that your specific (dc) value may be different.
- So in the above example, your API URL would be <u>https://us5.api.mailchimp.com/3.0/</u>

← → C (© https	:://us5admin.mailchimp.com/#	ntegration	
E	\mathbf{i}	have quick access to all marketing information s	uch as campaigns, member activities. Learn more
Create	Home	New Mailchimp	×
ද් Campaigns	~	of the fields to connect to your Mailchimp	
Choose Ma Learn more	ailchimp audiences that you API	ps://us5api.mailchimp.com/3.0/	Manage >
Sync Mar Create new Learn more	rketing List/Members API v or use your existing Marke ZZ	Key ZZZ ELKWK XMRKF WTBDI JPBRT PWQQN XCSLJ VHJDO W.	Manage >
	Nee	d help? How to find your API URL and API key	

• Use the **API URL** and **API key** to connect Mailchimp account with Dynamics 365 CRM.

Sync Audiences

Mailchimp Audience is where you keep all your contacts/members, Tags and then use campaigns to sent mails to your specific audiences or Tags.

This section will enable you to choose which Mailchimp Audiences you want to sync to CRM from the list of Mailchimp audiences as there could be more than one Audiences in Mailchimp. You can sync one or more Mailchimp Audience.

From this section, you can select Mailchimp Audience from the list of Audiences and sync to CRM but requires to tie/associate CRM Marketing List to it.

Upon Audience sync, the synchronization starts in the background and syncs Mailchimp Tags and creates the Mailchimp Members as Contact/Lead based on the associated Marketing List in the CRM.

To sync audiences, follow the steps given below:

• Go to Settings \rightarrow Setup \rightarrow Sync Audiences.

my vvorks 15 Dashboards 16 Marketing Activities	Marketing4Dynamics - Mailchimp Integration Marketing4Dynamics helps to sync. Marketing List and ensures that you have quick access to all marketing information such as campaigns, member activities. Learn more Mailchimp Account - Wise Solutions © Connected
Customers R Contacts	Reconnect to Mailchimp Account
60 Leads Marketing	Sync Audiences Choose Malichimp audiences that you want to sync to Dynamics 365 CRM. Manage > Learn more
Marketing Lists	Sync Marketing List/Members Create new or use your existing Marketing list to sync members from CRM to Mailchimp. Manage > Learn more
Setup Audiences Tags	Sync Campaigns Choose Malichimp campaigns that you want to sync to Dynamics 365 CRM. Learn more
 Interest Category Sync Jobs Error Logs License Registration 	

• Click on 'Manage'.

Marketing4Dynamics - Mailchimp Integration Marketing4Dynamics helps to sync Marketing List and ensures that you have quick access to all marketing information such as campaigns, member activities. Learn more					
МС	Mailchimp Account - Wise Solutions Connected				
	Reconnect to Mailchimp Account				
	Sync Audiences Choose Mailchimp audiences that you want to sync to Dynamics 365 CRM. Learn more	Manage >			
	Sync Marketing List/Members Create new or use your existing Marketing list to sync members from CRM to Mailchimp. Learn more	Manage >			
Í	Sync Campaigns Choose Mailchimp campaigns that you want to sync to Dynamics 365 CRM. Learn more	Manage >			

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Sync Settings Customization

Choose between "**Full Sync**" and "**Sync Only**" during the synchronization process as per requirements. This expands the range of available options and providing a more flexible synchronization approach.

Sync Audiences								×
Select Mailchimp Audience	that you want to sy	nc to CRM. You nee	d to map C	RM Marketing List with Ma	lichimp Audience. Members	will be added to se	elected Marketing List.	
Search Audiences and Segments]					
Audience Name ↑	Sync Settings	Segment Name	Tags	Marketing List (Lead)	Marketing List(Contact)	Last Sync Time	Audience Status	
Wise Solutions Subscribers	Full Sync $$							Sync Now
Wise Solutions Subscribers	Full Sync	Vip Members						Sync Now
Wise Solutions Subscribers	Sync Only	Marketing4Dyna						Sync Now
Wise Solutions Subscribers		Click2Export						Sync Now

Full Sync: allows users to comprehensively sync Mailchimp members into CRM. Users can flexibly opt for one or both Marketing Lists for synchronization.

Sync Only: restricts the migration of Mailchimp members into CRM. This mode operates by generating Mailchimp Audience records in the background, only bringing the Audience tags, interest and interest categories into the CRM environment. The selection of Marketing Lists is disabled, to focus only on synchronization without importing members.

Marketing List Mapping

Select a Marketing List within CRM that you wish to associate with a corresponding Mailchimp Audience. Dedicated columns for Marketing Lists are provided - one for **Leads** and another for **Contacts**. This clear segregation ensures distinct visibility and selection tailored to each specific Marketing List type.

It's important to note that there is no obligation to choose both Marketing Lists. Users have the flexibility to opt for either the **Marketing List (Leads)** or **Marketing List (Contacts)**, depending on their specific use case.

Choosing a specific Marketing List avoids duplicate deductions for both Leads and Contacts during the sync operation. The synchronization process is limited to the selected Marketing List, preventing any overlap or simultaneous checks between the two entities

Note: Only static marketing lists of type (Target At) Lead and Contact are supported. The Account type of the Marketing List is not applicable for selection.

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Sync Audiences								
Select Mailchimp Audience	that you want to s	nc to CRM. You nee	d to map C	CRM Marketing List with Ma	alichimp Audience. Members	will be added to s	elected Marketing List.	
Search Audiences and Se	gments]					
Audience Name ↑	Sync Settings	Segment Name	Tags	Marketing List (Lead)	Marketing List(Contact)	Last Sync Time	Audience Status	
Wise Solutions Subscribers	Full Sync 🗸							Sync Nov
Wise Solutions Subscribers	Full Sync	Vip Members						Sync Nov
Wise Solutions Subscribers	Sync Only	Marketing4Dyna						Sync Nov

• In this case, we have created a new Marketing List. For this, go to Marketing List → Click on the 'Search' icon → Click on 'New Marketing List'.

Marketin	ng4Dynamics: Mailchimp Integ					Try the new lo	ook 💽	Lookup Records	×
M	larketing4Dvn	amics - M	ailchimn I	ntear	ation			Select record	
N	Sync Audiences							Look for Marketing List	Q
	Select Mailchimp Audience	that you want to sy	nc to CRM. You need	d to map CR	M Marketing List with Ma	lichimp Audience. Members v	will be ade	No records found. Create a	a new record.
	Search Audiences and Segments							+ New Marketing List	Advanced lookup
	Audience Name ↑	Sync Settings	Segment Name	Tags	Marketing List (Lead)	Marketing List(Contact)	Last Syn		
	Wise Solutions Subscribers	Full Sync \sim							
	Wise Solutions Subscribers		Vip Members						
	Wise Solutions Subscribers		Marketing4Dyna						
14	Wise Solutions Subscribers		Click2Export						
	4					_			Add Cancel

• Fill the required details in marketing list and click on 'Save'.

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New Marketing List		Sune Status	Rob Ward
Summary Members Notes		Sync Status	
Information	Audience		
Name*			
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Targeted At* Targeted At* Source Source Source Source Source Save Save & Close + Wise Solution Whole Audience - Saved Marketing List Summary Members Notes Related ∨ Information	New 🖉 Sync 🗋 Deactivate 📋 Delete 🖒 Refresh 🔍 Check Access	s ₿₽ Process ∨ : Sync Status Last Sync Date	Coole Werd
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Targeted At* Targe	New Sync Deactivate Delete Refresh Check Access Audience Campaigns	s ₿J Process ∨ : Sync Status Last Sync Date + New Cam	Del Marel Conna

• A new marketing list is created. Now go back to 'Sync Audiences' and add this Marketing List.

							ook 💽	Lookup Records	×
	Marketing4Dvn	amics - M	ailchimn I	ntear	ation			Select record	
	Sync Audiences							🖾 Wise Solution Whole Audience 🛛 🗙	
	Select Mailchimp Audience	that you want to sy	nc to CRM. You need	d to map CR	RM Marketing List with Ma	ichimp Audience. Members	will be ad	Look for Marketing List	Q
	Search Audiences and Seg	iments						Recent Marketing Lists	All records
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	Audience Name T	Sync Settings	Segment Name	Tags	Marketing List (Lead)	Marketing List(Contact)	Last Syn	C) Direct Mailer Scan Yes	
	Wise Solutions Subscribers	Full Sync \vee						Direct Mailer Scan No	
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	Wise Solutions Subscribers		Click2Export						
ľ									
	1								
								Add	Cancel

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Marketing4Dynamics – User Manual								
Click on	'Sync Now	<i>.</i>						
Sync Audiences								×
Select Mailchimp Audience	that you want to sy	ins to CPM You poor						
Select Malente	e that you want to sy	The to error. Tou need	u to map C	RM Marketing List with Ma	lichimp Audience. Members	will be added to sel	lected Marketing List	
Search Audiences and Sea	gments	The to CKM. Four neer		RM Marketing List with Ma	lichimp Audience. Members	will be added to sel	lected Marketing List	
Search Audiences and Sea	gments Sync Settings	Segment Name	Tags	RM Marketing List with Ma Marketing List (Lead)	lichimp Audience. Members Marketing List(Contact)	will be added to sel Last Sync Time	lected Marketing List	
Search Audiences and See Audience Name ↑ Wise Solutions Subscribers	gments Sync Settings Full Sync	Segment Name	Tags	RM Marketing List with Ma Marketing List (Lead)	Marketing List(Contact)	Last Sync Time	lected Marketing List Audience Status	Sync Now

• A pop-up will appear stating that the sync process has started \rightarrow Click on Ok.



• The status is now changed to 'In-progress' which indicates that the synchronization of Audience is in under process. (See Status section to know meaning of each Sync Status).

Sync Audiences								×	
Select Mailchimp Audience that you want to sync to CRM. You need to map CRM Marketing List with Malichimp Audience. Members will be added to selected Marketing List.									
Search Audiences and Se	gments								
Audience Name \uparrow	Sync Settings	Segment Name	Tags	Marketing List (Lead)	Marketing List(Contact)	Last Sync Time	Audience Status		
Wise Solutions Subscribers	Full Sync				Wise Solution Whole Audie		In Progress	Sync Now	

• Refresh or revisit this page to see the current Sync Status.

Sync Audiences	Sync Audiences									
Select Mailchimp Audience that you want to sync to CRM. You need to map CRM Marketing List with Malichimp Audience. Members will be added to selected Marketing List.										
Search Audiences and Se	Search Audiences and Segments									
Audience Name ↑	Sync Settings	Segment Name	Tags	Marketing List (Lead)	Marketing List(Contact)	Last Sync Time	Audience Stat			
Wise Solutions Subscribers	Full Sync				Wise Solution Whole Audience	3/5/2024 3:14 PM	Synced	Sync Now		

• Also, you can verify the Sync Status by navigating to Settings -> Audiences.

=	\leftarrow 🖾 Show Chart + New 📋 Delete \vee 🖒 Refresh 🏄 Visualize this view	토킹 Email a Link 🌱 🔊 Flow 🗸 🗐 Run Report 🗸 🗄	🖻 Share \checkmark
影 Dashboards	Active Audiences \vee	$\overline{\mathbb{II}}$ Edit columns ∇ Edit filters	Filter by keyword
Marketing Activities	O Name ~	Rating * Sync Status * Last Sync Date	e ↓ ~
Customers	Wise Solutions Subscribers	0 Synced 3/5/2024 3:14	PM
A Contacts			
🎯 Leads			
Marketing			
Marketing Lists			
🖘 Campaigns			
Settings			
O Setup			
👪 Audiences			
Tags			

• Once it is synced, you will see two changes in CRM data. Firstly, Mailchimp Tags will get synced to CRM and then secondly, Mailchimp Members will get created as contacts/leads and associated with the selected Marketing List.

Mailchimp Tags:

E			Q Search Mailchimp		
\square	/ Create		Tags		Create Tag Bulk Tag Contacts
Ś	Campaigns	~	Overview Manage contacts V	Add contacts V Subscriber preferences	Settings 🗸 🔍
ද	Automations	~			
83	Audience	^	_		
	Audience dashboard	- 1	Sort by Date created	Delete	
	All contacts	- 1		Created date	
	Signup forms		Influencer	May 2, 2024	View V
	Tags				
	Segments		Event Attendee	Created date	View 🗸
	Surveys			May 2, 2024	
	Subscriber preference	is		Created date	
_	Inbox		Dynamic Contact	Apr 30, 2024	View V

Tags in CRM: The tags in Mailchimp will be also be synced and can be seen in both 'Tags' and 'Audiences' entity. To verify this, go to Audiences --> Tags or Settings --> Tags.

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-	C L G G				13 74 A33igin 22 11	. 2 316
ly Works Dashboards Marketing Activities	Wise Solutions S Audience General Marketing	ubscribers - saved J Details Related \sim		Sy Sy	nc Status A3/5/2024 3:5 Last Sync Date	7 PM
ustomers Contacts	A Name	* Wise Solutions Subscribers	Tags			() Refresh :
Leads				Name ~	Sync Status ~	Last Sync Date ↓ ~
arketing				Customer	Synced	3/5/2024 3:56 PM
Marketing Lists				Influencer	Synced	3/5/2024 3:56 PM
Campaigns				Member	Synced	3/5/2024 3:56 PM
tings				Gamifics 365	Synced	3/5/2024 3:56 PM
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=	← 🖾 Show Chart + New 🛍 De	lete 🛛 🗸 🕐 Refresh 🛛 📋 Visualize this view	w 🖾 Email a Link 🗸 🔊 Flow	$ \! \! \! \! \! \! \! \! \! \! \! \! \! \! \! \! \! \! $	🖻 Share ${}^{\checkmark}$
My Works	Active Tags \vee		13	Edit columns 🛛 Edit filters Filter by key	vord
影 Dashboards	O Name ~	Audience ~	Sync Status ~	Last Sync Date ↓ ~	
Marketing Activities	Customer	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM	
Customers	Influencer	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM	
A Contacts	Member	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM	
& Leads	Gamifics 365	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM	
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Marketing Lists	Prospect	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM	
San Campaigns	Client	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM	
Settings	Event Attendee	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM	
Setup					
Tags					

• Mailchimp Members will get created as Contacts/Leads and associated wih the selected Marketing List. Members can be seen under the **Marketing List** that you **map** with **Mailchimp Audience.** You can identify the Marketing List by **Audience Lookup**.

Wise Solution Whole Audience - Saved Marketing List				Synced 3/5/2024 3 Sync Status Last Sync Da	te Rob Wa	rd 🗸
Summary Members Notes Related \vee						
Information	Audience	Wise Solutions Subscribers	🔒 Tag			
Name* Wise Solution Whole Audience						
A List Type* Static	Campaigns					
Purpose					+ New Campaign	:
	Name ↑ ∽			Campaign Code ~	Status Reason ~	

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Wise Solution Whole Audience - Saved Marketing List				Synced 3/5/2024 3:57 PM Jast Sync Status Last Sync Date Concern	\sim
Summary Members Notes Related \vee					
Members					-
				$\stackrel{=}{\to}$ Add \circlearrowright Refresh 🖏 Quick Campaign \lor :	
\checkmark Full Name \uparrow \checkmark	Email 🗸	Company Name \checkmark	Sync Status \checkmark		-
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Aarika Firbanks	aainsworthno@live.com		Synced		
Ab Berks	aberksrp@google.com		Synced		
Ab Gostall	agostall7z@ftc.gov		Synced		
Abbey test Kent	abbeykent@gmail.com		Synced		
Abi	Abi@gmail.com		Synced		

Mailchimp Interest / Group:

Create	Overview Manage contacts × Add contacts × Subscriber preferences Settings × Q	
🌿 Campaigns 🧄	Groups	Create Groups
All campaigns Campaign Manager	Wire Solution - Edit Checkboxes - Delete	Hide Groups
Automations ^ Overview All journeys	Marketing · Edit	Delete · Import · Send ~
Pre-built journeys Transactional email	Development - Edit	Delete · Import · Send V
Audience ^	Sales - Edit 1 contacts	Delete · Import · Send V
All contacts Signup forms	Add Group	
Segments Surveys	Sales - Edit Checkboxes - Delete	View Groups
Subscriber preferences Inbox	Warehouse · Edit Checkboxes · Delete	View Groups
nll Analytice V Upgrade		

• Interest/ Group in CRM: The Interest/ Group in Mailchimp will be also be synced and can be seen in 'Interest' entity. To verify this, go to Audiences --> Interest or Settings --> Interest.



ਆy works 新 Dashboards 윤 Marketing Activities	Wise Solution Audience General Marke	1 - Saved ting Details Related \vee		Synced Sync Status	5/6/2024 10:17 AM Last Sync Date	Currer
Customers R Contacts @ Leads	A Name A Rating	* Wise Solution 会会会会会	Interest Category	у		:
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ettings			Wire So	olution Wis	e Solu 🖉 Synced	4/3
Audiences			1 - 3 of 3		id ∢	⊱ Page 1 →
Interest Category Sync Jobs						

ीं Dashboards	Active Interes	st Category ~				Edit columns	Y Edit filters	Filter by keyword
Marketing Activities	○ Title î ~			Audience ~	Syr	nc Status Y		Last Sync Date ~
Customers	Sales			Wise Solution	ø	Synced		4/30/2024 2:37 PM
A Contacts	Warehouse			Wise Solution	ø	Synced		4/30/2024 2:37 PM
🤄 Leads	Wire Solution			Wise Solution	ø	Synced		4/30/2024 2:37 PM
Marketing								
Arketing Lists								
Campaigns								
Settings								
🗘 Setup								
Audiences								
🖾 Tags			G					
Interest Category								

 Mailchimp Members will get created as Contacts/Leads and associated wih the selected Marketing List. Members can be seen under the Marketing List that you map with Mailchimp Audience. You can identify the Marketing List by Audience Lookup.

	G Sync Now O Kerresh So C	Lineck Access C. Assign Z How ~	word templates · :
Wire Solution - Saved Interest Category General Marketing Details Related ~			4/30/2024 2:37 PM Last Sync Date
Title "Wire Solution			
Active Interests \sim			$+$ New Interest \circlearrowright Refresh $*^a$ Flow \checkmark ;
O Name ~	Audience ~	Sync Status ~	Last Sync Date ↓ ~
Sales	Wise Solution	 Synced 	4/30/2024 2:37 PM
Development	Wise Solution	Synced	4/30/2024 2:37 PM
Marketing	Wise Solution	Synced	4/30/2024 2:37 PM
			r s rayer r
	Wire Solution - Saved Interest Category General Marketing Details Related ~ Title * Wire Solution Active Interests ~ Name * Storage Sales Development Marketing 1-4 orl4	Wire Solution - Saved Interest Category General Marketing Details Related > Title * Wire Solution Active Interests > Name > Audience > Storage Wise Solution Sales Wise Solution Development Wise Solution Marketing Wise Solution 1 -4 of 4	Wire Solution - Saved Interest Category General Marketing Details Related \circ Title * Wire Solution Active Interests \circ Name \circ Audience \circ Storage Wise Solution Sales Wise Solution Development Wise Solution Marketing Wise Solution 1-4 or4

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Configure Global Setting

To establish the default list type for new email addresses in your CRM, use the Global Settings feature. This choice becomes the default for any email address not already in your CRM, ensuring efficient email address management.

To configure, follow these steps:

• Click on 'Edit Settings'.

Marketi Marketing4Dyn	Marketing4Dynamics - Mailchimp Integration Marketing4Dynamics helps to sync Marketing List and ensures that you have quick access to all marketing information such as campaigns, member activities. Learn more								
МС	Mailchimp Account - Wise Solutions Connected								
	Reconnect to Mailchimp Account								
	Sync Audiences Choose Mailchimp audiences that you want to sync to Dynamics 365 CRM. Learn more	Manage >							
<u>لاتا</u> ال	Sync Marketing List/Members Create new or use your existing Marketing list to sync members from CRM to Mailchimp. Learn more	Manage >							
"	Sync Campaigns Choose Mailchimp campaigns that you want to sync to Dynamics 365 CRM. Learn more	Manage >							

 From the dropdown menu that appears, choose between Leads or Contacts based on your preference.

Market	ing4Dynamics - Mailchimp Integration	Marketing4Dynamics Settings
Marketing4Dyr	amics helps to sync Marketing List and ensures that you have quick access to all marketing information such as o Mailchimp Account - Wise Solutions Connected Reconvect to Mailchimp Account	Create new Leads or Contacts in Dynamics 365 CRM for email addresses that don't match existing Leads or Contacts. Choose either Lead or Contact that you want create if matching Lead and Contact not found in CRM. Learn more.
	Sync Audiences Choose Mailchimp audiences that you want to sync to Dynamics 365 CRM. Learn more	Enable if you want to sync Interests and Interest Categories.
	Sync Marketing List/Members Create new or use your existing Marketing fat to sync members from CRM to Mailchimp. Learn more	
بد	Sync Campaigns Choose Mailchimp campaigns that you want to sync to Dynamics 365 CRM. Learn more	
		Save Cancel

Interest/ Group Sync Activation

Toggle on this switch to sync Interests/Groups and Interest/Group Categories between Mailchimp and CRM.

- Interest/Group: The compilation of contacts organized based on their interests or preferences. Each group is identified by a category and includes specific group names. There are different options within your group. For instance, under the group category "Occupational role," you could list options like Developer, Tester, and Product Manager. Consider group names as subcategories, aiding in better sorting and locating of contacts.
- Interest/Group Category: The classification for your group, such as "Occupational role."

By default, this sync setting is set to **'OFF'**. Depending on user preferences, it can be toggled to **'ON'** to enable the sync of Interests/Groups from Mailchimp to CRM.

Note: If you're utilizing the Group Functionality feature in MailChimp, ensure that you set this as 'ON.'

Marketing4Dyn	ing4Dynamics - Mailchimp Integration amics helps to sync Marketing List and ensures that you have quick access to all marketing information such as c	Marketing4Dynamics Settings × Create new Leads or Contacts in Dynamics 365 CRM for email addresses that don't match evictions Lader of Contacts
МС	Mailchimp Account - Wise Solutions Connected Bernment In Mailchimp Account Cold Stations	Choose other Lead or Contact that you want create if matching Lead and Contact not found in CRM. Lear more
	Sync Audiences Choose Malkhimp audiences that you want to sync to Dynamics 365 CRM. Learn more	Enable If you want to sync interests and interest Categories.
₹ Î	Sync Marketing List/Members Croate new or use your existing Marketing list to sync members from CRM to Mailchimp. Learn more	
4	Sync Campaigns Choose Mailchimp campaigns that you want to sync to Dynamics 365 CRM. Learn more	
		Save

• Click on the **'Toggle'** switch to enable this feature

Sync Marketing List/ Members

In the previous section, we synced Mailchimp Audience to CRM and eventually synced Mailchimp Members to CRM as Contacts or Leads.

In this section, we will sync the Dynamics 365 CRM Marketing List to Mailchimp which will eventually sync CRM Contacts/Leads to Mailchimp.

Also, it will only sync those contacts/leads that were added to the Marketing List.

This is helpful when you want to plan and execute marketing activities through Mailchimp targeting the customers in Dynamics 365 CRM. You can create a Marketing List in CRM with contacts/leads and then with a single click you can initiate the sync process for that Marketing List. Now, any new member added

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to this Marketing List will get automatically synced to Mailchimp. Also, any updates made to any members of Marketing List will get automatically synced to Mailchimp.

For Example: You have imported a list of contacts to Dynamics 365 CRM of those who have attended the webinar or any promotional event. Now, you want to push those contacts to Mailchimp so that the Marketing team can send them further exclusive promotional campaigns. In this case, you can create a new Marketing List **'2021 Event Attendees'** in CRM and add all those contacts into it.

Now to sync this Marketing List to Mailchimp, follow the steps given below:

• Go to Settings \rightarrow Setup \rightarrow Sync Marketing List/Members \rightarrow Click on 'Manage'.

	Marketing4Dynamics - Mailchimp Integration Marketing4Dynamics helps to sync Marketing List and ensures that you have quick access to all marketing information such as campaigns, member activities. Learn more
# Dashboards# Marketing Activities	Mailchimp Account - Wise Solutions Connected
Customers & Contacts	Reconnect to Mailchimp Account
© Leads	Sync Audiences Choose Mailchimp audiences that you want to sync to Dynamics 365 CRM. Learn more Manage >
Marketing Lists	Sync Marketing List/Members
Campaigns	Create new or use your existing Marketing list to sync members from CRM to Maikhimp. Learn more Manage >
Setup Audiences Tess	Sync Campaigns Choose Mailchimp campaigns that you want to sync to Dynamics 365 CRM. Learn more
Interest Category Sync Jobs	

• This will be redirected to the Marketing List home grid.

::: Dynamics 365	Marketing4Dynamics: Mailchimp Integ				م	Ø 8	+ 7	₿?	RH
=	\leftarrow 🛱 Show Chart + New 🗊	Delete 🗸 💍 Refresh	🖾 Email a Link 🛛 🗸	≫ Flow ∨ 🗖	Run Report	Excel	Templates 🗸 🗸	:	
A Contacts	Marketing4Dynamics Mar	Marketing4Dynamics Marketing Lists ~ 7							Q
& Leads	✓ Name ↑ ∨	Type \checkmark Mark	teting List Member Type \vee	Members Count 🗸 🛛	Audience \vee	$ $ Tag \vee		Sync Status	~ La
Marketing	New Customers List	Static Cor	tact	0 1	Wise Solution	is Subscrit Confe	rence Lead		
🗟 Marketing Lists	Wise Solutions Whole Audience	Static Cor	tact	16	Wise Solution	is Subscrit		Synce	ed 04
🖘 Campaigns									

• Or, directly go to Marketing4Dynamics App \rightarrow Marketing \rightarrow Marketing Lists.

=	Figure 2 Show Chart + New Delete \circ Deletee \circ Deleteeeeeeeeeeeeeeeeeeee								🖻 Shar	e V	
Customers	Marketing4Dynamics Marketing Lists* \vee					Edit columns 🛛 🖓 Edit filters Filter by keyword				d	
A Contacts	0	Name ↑ ~	Type ~	Marketing List Member Type \scriptstyle	Members Count ~	Audience ~	Tag ~	Interest ~	Sync Sta	itus ~	L
& Leads		New Customer List	Static	Contact	0	Wise Solutions Subscril					
Marketing		Wise Solution Whole Audience	Static	Contact	57	Wise Solutions Subscril			🛛 Syn	ced	3/
 Marketing Lists Campaigns 											

• Click on '+ New' to create a new Marketing List.

	IV OR	efresh 👍 Visualize this view 🖙	🕽 Email a Link Υ 🛛 Σ	🔊 Flow 💛 🔟 Run Re	eport 🗸 🗄		🖻 S	Share 🗡
ting4Dynamics Marketing	g Lists* \vee			😨 Edit columns	∑ Edit filters	Filter b	oy keyword	
ne ↑ ~	Туре ~	Marketing List Member Type ~	Members Count ~	Audience ~	Tag Y li	nterest ~	Sync Status ~	L
Customer List	Static	Contact	0	Wise Solutions Subscrib				
Solution Whole Audience	Static	Contact	57	Wise Solutions Subscrib			Synced	3/
	ing4Dynamics Marketin : ↑ ~ Customer List Solution Whole Audience	ing4Dynamics Marketiru Lists* > th> Type > th> Static Solution Whole Audience Static	ing4Dynamics Marketirs Lists* > ing4Dynamics	ImpedDynamics Marketing Lists* Type ` Marketing List Member Type ` Members Count ` 1 ` Type ` Marketing List Member Type ` Members Count ` Customer List Static Contact 0 Solution Whole Audience Static Contact 57	Imp4Dynamics Marketing Lists* > Imp6 Lists* > Imp6 List Member Type > Members Count > Audience > Imp6 List Static Contact 0 Wise Solutions Subscrith Solution Whole Audience Static Contact 57 Wise Solutions Subscrith	Imp4Dynamics Marketing Lists* ✓ Imp6 Edit columns Imp6 Edit columns <th>ImpedDynamics Marketing Lists* ∨ Impedit Columns V Edit filters Filter I t1 ^ Type Y Marketing List Member Type Y Members Count Y Audience Y Tag Y Interest Y Edit columns Static Contact 0 Wise Solutions Subscrit Y Y Solution Whole Audience Static Contact 57 Wise Solutions Subscrit Y</th> <th>Imp4Dynamics Marketing Lists* ✓ Imperiation Type ✓ Marketing List Member Type ✓ Members Count ✓ Audience ✓ Tag ✓ Interest ✓ Sync Status ✓ Customer List Static Contact 0 Wise Solutions Subscrit ✓ ✓ ✓ ✓ ✓ Sync datus ✓ Solution Whole Audience Static Contact 57 Wise Solutions Subscrit ✓</th>	ImpedDynamics Marketing Lists* ∨ Impedit Columns V Edit filters Filter I t1 ^ Type Y Marketing List Member Type Y Members Count Y Audience Y Tag Y Interest Y Edit columns Static Contact 0 Wise Solutions Subscrit Y Y Solution Whole Audience Static Contact 57 Wise Solutions Subscrit Y	Imp4Dynamics Marketing Lists* ✓ Imperiation Type ✓ Marketing List Member Type ✓ Members Count ✓ Audience ✓ Tag ✓ Interest ✓ Sync Status ✓ Customer List Static Contact 0 Wise Solutions Subscrit ✓ ✓ ✓ ✓ ✓ Sync datus ✓ Solution Whole Audience Static Contact 57 Wise Solutions Subscrit ✓

• This will open up a Marketing4Dynamics Marketing List form.

← 🖆 🔚 Save 🛱 Save & Close + New	🔊 Flow 🖂				
New Marketing List		 Sync Status	 Last Sync Date	Rob Ward Owner	\sim
Summary Members Notes					
Information	Audience				
Name*					
 List Type*	Campaigns				
Static					
Purpose					
largeted At*					
Source					
Currency					

For Tags

- In the new Marketing List, enter the following information,
 - Name: The name of Marketing List
 - List Type: Select either Static or Dynamic. You can sync both types of Marketing List.

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- **Target At:** Select either **Contact** or **Lead.** You can add either contact or lead to the marketing list based on the option selected. Account type of Marketing list is not supported.
- Audience: Select the Mailchimp Audience with which you want to sync this Marketing List and its members.
- **Tag:** Select the **Tag** that you want to associate with a member in Mailchimp. The selected tag will be attached to members in Mailchimp.

← 🗗 🖬 Save 🛱 Save & Close + New	🔗 Sync 🛛 🗋 Deactivate	🛍 Delete 💍 Refresh 🔍 Ch	eck Access 🛛 🛱 Process 🗸	:	🕈 Share 🗸
2024 Event Attendees - Saved Marketing List Summary Members Notes Related \vee			 Sync Sta	tus Last Sync Date Comer	rd 🗸
Information	Audience	Wise Solutions Subscribers	Tag	Event Attendee	
Name* 2024 Event Attendees					
A List Type* Static	Campaigns				
Purpose				+ New Campaign	:
	Name ↑ ∽		Campaig	jn Code ∽ Status Reason ∽	
合 Targeted At* Contact		No	o data available		
Source					

• In Members tab, now you can add members either static or dynamic. Use 'Manage Members' button to members to the Marketing list.

≡	← 🗠 🗟 Save & Close + New 🖉 Sync 🗋 Deactivate 🗊 Delete 🖒 Refresh 🖏 Check Access 🛱 Process ∨ :
Customers Q Contacts	2024 Event Attendees - Saved
Marketing	Members Image: Word Templates > Image: Templates Image: Templates > Image: Templates Image: Templates >
A Marketing Lists	🗮 Add 🕐 Ref 🖏 Create Quick Campaign
Campaigns	✓ Full Name ↑ ∨ Email ∨ Company Name ∨ Business Phone ∨ Subscriber Status ∨ Sync Status ∨
Settings Setup Audiences	De data available.
Tags Interest Category	

• As soon as you save the Marketing List, you will see a **'Sync'** button. Only System Administrator or Marketing4Dynamics Administrator can sync the Marketing List.

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	Marketing4	Dynamics – User Man	ual	
024 Event Attendees - Saved			 Sync Status	Last Sync Date
ummary Members Notes Related \vee				
Information	Audience	Wise Solutions Subscribers	Tag	Event Attendee
Name*				
2024 Event Attendees				
🔒 List Type*	Campaigns			
Static	campaigns			
Purpose				+ New Campaign :
	Name ↑ ∽		Campaign Code	e ∽ Status Reason ∽
☐ Targeted At*				
Contact		No data ava	ilable	
Source				
Currency				

• Once the **'Sync'** button is clicked, a dialog box will appear asking confirmation. After getting confirmation, the synchronization process will get started in the background.

Confirm Sync	×
All the list members will be promoted to your Mailchimp accor upon syncing. Are you sure you want to proceed?	unt
OK Cance	I

• The Sync Status will change to 'In Progress'.

2024 Event Attendees - Saved Marketing List Summary Members Notes Related ~				In Progress Sync Status Last Sync Date
Information	Audience	: Wise Colutions Subscribers	Tag	
Namo*	Addience	wise solutions subscribers	lag	Event Attendee
2024 Event Attendees				
0				
台 List Type*	Campaigns			
Static				
Purpose				+ New Campaign :
	Name ↑ ∽			Campaign Code ~ Status Reason ~

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• Once the process is completed the Sync Status will change to either 'Synced' or 'Error'.

2024 Event Attendees - Saved Marketing List Summary Members Notes Related ~			Sync Sync	Status 3/5/2024 4:42 PM Last Sync Date
Information Name* 2024 Event Attendees	Audience	Wise Solutions Subscribers	🛆 Tag	Event Attendee
A List Type* Static Purpose	Campaigns			+ New Campaign :
	Name ↑ ∽			Campaign Code ~ Status Reason ~

• Also you can check Sync Status of individual member.

	Ц	Save	💕 Save & Close	+ New	Sync Now [👌 Deactivate 📲] Delete 🕐 Refre	sh 🔍 Check Acc	ess :	🖻 Share 🗸
2024 Ev Marketing I Summary	List	Attende	PS - Saved Notes Related N	~			Sync : Sync :	ed 3/5/2024 4 Status Last Sync Dai	4:42 PM	~
Members	s									
		1						7	Add 🕐 Refresi	h :
• F	Ab Gos	tall		aq	ostall7z@ftc.gov	Company Name ~	Business Phone	Subscribed	Sync Status V	-
P	Abi			At	i@gmail.com			Subscribed	Synced	
A	Adam C	D. Murray		ad	am116232@gmail.co	liona		Subscribed	8 Error	
A	Ajinkya			Aj	inkya.l@gmail.com	***	() (() () () () () () () () (Subscribed	Synced	
A	Alex Ba	ker		ale	ex@treyresearch.net	Trey Research	619-555-0127	Subscribed	Synced	
IN	van Ca	shin		iva	in@bellowscollege.co		966-555-0152	Subscribed	Synced	
								I	6	

• During the process, it checks for any existing members in the selected Mailchimp Audience. And if there are members then it updates the members (profile information) or else it will create new members and attach the selected Tags to them.

Ivan Casl	nin M4D on Feb 23, 2024 ET	Overview Insights Notes Settings
Email Subscribed Opted in on Feb 23, 24	D24 ET	
Contact Information	Edit	
Email Address	ivan@bellowscolleg e.com	Add
First Name	lvan Coshin	Notes
Address	678 Dayton Columbus, Ohio 43085 USA	You have not added any notes to this contact yet.
Phone Number	966-555-0152	
Untitled	-	
Untitled	_	
Predicted Gender	Unknown	
Predicted Age U	nknown	

For Interest

- In new Marketing List, enter the following information,
 - **Name:** The name of Marketing List
 - List Type: Select either Static or Dynamic. You can sync both type of Marketing List.
 - **Target At:** Select either **Contact** or **Lead.** You can add either contact or lead to the marketing list based on the option selected. Account type of Marketing list is not supported.
 - Audience: Select the Mailchimp Audience with which you want to sync this Marketing List and its members.
 - **Interest:** Select the **Interest** that you want to associate with a member in Mailchimp. The selected interest will be attached to the member in Mailchimp.

← 🗄 🖾 🖬 Save 🛱 Save & Close + N	ew 🔗 Sync 🛛 Deactivate	e 🛍 Delete 🖒 Refresh 🤇	💫 Check Access	😫 Process \vee 💠 🗄 🖻 Share	~
Email Registrations - Saved Marketing List				Sync Status Last Sync Date	
Summary Members Notes Related \vee					
Information	Audience	Wise Solutions Subscribers	Interest	Harketing	
Name*					
Email Registrations					
≙ List Type*	Campaigns				
Static				+ New Compaign	
Purpose				- New Campaign :	
	Name ↑ ∽			Campaign Code ~ Status Reason ~	
☐ Targeted At*					
Contact		No	data available		
Source					

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• In Members tab, now you can add members either static or dynamic. Use 'Manage Members' button to members to the Marketing list.

=	← 🗄 🗗 🖬 Save 🛱 Save & Close + New 🖉 Sync 🕼 Deactivate 🗎 Delete 🖒 Refresh 🔍 Check Access 🛱 Process ∨ 🗄
Customers & Contacts	Email Registrations Saved Marketing List Sync Status Summary Members Notes Related ~ Notes Related ~
Marketing	Members Q Word Templates >
Marketing Lists	👎 Add 💍 Refresh 🖏 Create Quick Campaign
Campaigns	✓ Full Name ↑ ∨ Email ∨ Company Name ∨ Business Phone ∨ Subscriber Status ∨ Sync Status ∨
Settings Setup Audiences	No data available.
lags linterest Category	

• As soon as you save the Marketing List, you will see a **'Sync'** button. Only System Administrator or Marketing4Dynamics Administrator can sync the Marketing List.

\leftarrow	11	ď	日 Save	🛱 Save & Close	+ New	🖉 Sync	🔓 Deactivate	🗓 Delete	🖔 Refresh	🔍 Check Access	🗄 Process 🗸	:	🖄 Share 🗸
En Mai	hail R Keting	Regis List	trations	- Saved							Sync Status Las	t Sync Date	ner 🗸
Sur	nmar	у М —	embers	Notes Related \	/								
Ir	forma	tion				Audience		👪 Wise Solu	tions Subscribe	rs Interest	E	Marketing	
	Nam	e*											
	Emai	l Regis	trations										
E	ک List T	ype*				Campaigns							
	Statio	с										+ New Campaig	
	Purp	ose										i New Campaig	<u> </u>
						Na	ime Y				Campaign Code Y	Status Reason Y	
6	1 Targe	eted At	*										
	Cont	act							1	No data available			
	Sour	ce											

• Once the 'Sync' button is clicked, a dialog box will appear asking confirmation. After getting confirmation, the synchronization process will get started in the background.



• The Sync Status will change to 'In Progress'.

Email Registrations - Saved Marketing List			In Pro Sync St	atus	~
Summary Members Notes Related ~	Audiance	11 Mars Caludiana Caluaribara	Interact		
Name* Email Registrations	Addence	Wise Solutions Subscribers	interest		
☐ List Type*	Campaigns				
Purpose				+ New Campaign	a
	Name ↑ ∽		Camp	aign Code ~ Status Reason ~	
🔒 Targeted At*					
Contact		No data	a available		

• Once the process is completed the Sync Status will change to either 'Synced' or 'Error'.

Email Registrations - Saved Marketing List Summary Members Notes Related ~			Synced 3/7 Sync Status Last	7/2024 5:00 PM	~
Information	Audience	Wise Solutions Subscribers	☐ Interest	I Marketing	
Name* Email Registrations					
A List Type* Static	Campaigns				
Purpose				+ New Campaign	8
	Name 1 ~		Campaign C	Code ~ Status Reason ~	
A Targeted At*					
Contact		No data	a available		

• Also you can check Sync Status of individual member.

Email Registrations - Saved Marketing List				Synced 3/7/20 Sync Status Last Syn	024 5:00 PM	Owner
Summary Members Notes Related \vee						
Members						
			:= ;	Add 🖒 Refresh	ଷ୍ଟ Quick Camı	oaign ∨ ∶
✔ Full Name ↑ ∨	Email ∨	Company Name \checkmark	Business Phone \vee	Subscriber Status \lor	Sync Status \checkmark	
Gabriela Christiansen	gabriela@adatum.com		930-555-0168	Subscribed	Synced	
Kevin Martin	kevin@adatum.com	A. Datum Corporation	425-555-0160	Subscribed	Synced	
Kim Rocha	kim@treyresearch.net	Trey Research	567-555-0157	Subscribed	Synced	
Lilly Pyles	lilly@adatum.com		557-555-0166	Subscribed	Synced	
Miguel Garcia	miguel@northwindtraders	• Northwind Traders	614-555-0127	Subscribed	Synced	

• During the process, it checks for any existing members in the selected Mailchimp Audience. And if there are members then it updates the members (profile information) or else it will create new members and attach the selected Tags to them.

('briction	500	
Christian	Sell	Write a Note
Originated from API - M	40 on Feb 23, 2024 E1	
Email Subscribed		
Opted in on Feb 23, 20	24 ET	
Contact Information	Edit	Add Note
Email Address	gabriela@adatum.co	
	m	Notes
First Name	Gabriela	
Last Name	Christiansen	You have not added any activate shift and the
Address	2345 Birchwood Dr Redmond	rou nave not added any notes to this contact yet.
	Washington 98101	
	USA	
Phone Number	930-555-0168	
Untitled	-	
Untitled	-	
Untitled	-	
Predicted Gender	Unknown	
Predicted Gender Predicted Age Un	Unknown Iknown	
Predicted Gender Predicted Age Un Tags	Unknown Iknown Manage Tags 🛃	
Predicted Gender Predicted Age Un Tags You have not assig contact yet	Unknown known Manage Tags [2] ned any tags to this	
Predicted Gender Predicted Age Un Tags You have not assig contact yet Add a tag	Unknown Iknown Manage Tags [2] ned any tags to this	
Predicted Gender Predicted Age Un Tags You have not assig contact yet Add a tag	Unknown Iknown Manage Tage (2) ned any tage to this	
Predicted Gender Predicted Age Un Tags You have not assig contact yet	Unknown Iknown Manage Tags [2] ned any tags to this Edit Groups	
Predicted Gender Predicted Age Un Tags You have not assig contact yet Add a tag Croups Wire Solution	Unknown Iknown Manage Tags [2] ned any tags to this Edit Groups Marketing	

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Sync Campaigns

In previous sections, we synced Mailchimp Audiences, Tags, and Members to Dynamics 365 CRM and then we synced the CRM Marketing List (Contacts or Leads) to Mailchimp.

These two sections ensure that the customer data in both Mailchimp and Dynamics 365 CRM is up to date. Because of this Marketing Team can be assured of the customer data and will not need to depend on manual data creation or data imports in Mailchimp. The marketing team can go ahead and run a campaign against the subscribed members.

In this section, we will sync Mailchimp campaigns and member's activities in CRM. This will help CRM users get marketing stats directly in CRM and will further help to decide on future sales strategies.

All the campaigns in Mailchimp that have been sent to the subscribers will be synced to Dynamics 365 CRM. To sync the campaigns, follow the steps given below:

• Go to Settings \rightarrow Setup \rightarrow Sync Campaigns \rightarrow Click on 'Manage'.

	Marketing4Dynamics - Mailchimp Integration Marketing4Dynamics helps to sync Marketing List and ensures that you have quick access to all marketing information such as campaigns, member activities, Learn more
# Dashboards # Marketing Activities	Mailchimp Account - Wise Solutions
Customers R Contacts	Reconnect to Mailchimp Account
© Leads Marketing	Sync Audiences Choose Malichimp audiences that you want to sync to Dynamics 365 CRM. Learn more Manage >
 Marketing Lists Campaigns Settings 	Sync Marketing List/Members Create new or use your existing Marketing list to sync members from CRM to Mailchimp. Manage > Learn more
Setup Audiences Tags	Sync Campaigns Choose Mailchimp campaigns that you want to sync to Dynamics 365 CRM. Learn more Manage >
B Interest Category	

- Select the campaign \rightarrow Enter the number of days in 'Auto Sync Activities' \rightarrow Click on 'Sync Now'.
- In the 'Campaign Sent On' section, the latest campaign will be listed on top followed by the previous campaign and so on. The 'Auto Sync Activities' section is to determine the period for which the campaign activities will be synced to CRM.

Sync	Campaigns							
Select	Mailchimp Campaign that	you want to sync to CRM.						
Search Campaigns								
	Campaign Name	Campaign Sent On †	Auto Sync Activities	Last Sync Time	Status			
	10 IZ							
0	Anna description	2021-07-22	30 🗘 Days	• ••	**	Sync Now		

• A pop-up will appear stating that the sync process has started \rightarrow Click on Ok.



• After a short while, the campaign activities in Mailchimp will be synced to Dynamics 365 CRM and can be seen in 'Campaigns' entity.

Dynamics 365	Marketing4Dynamics: Mailchim	p Integ			ר א ⊗ א א	© ? (RH
≡ ŵ Home	← E Save &	J Save & Close + New 🔀 Deac	tivate 📋 Delete 🖒 Refresh 🔍 Check Access 🗈) Copy as Ca	Margin Copy as Template Process 8/16/2021 3:44 PM Synced Active Last Sync Date Sync Status Status	 ✓ : Roy Harper → Owner →
S Recent ✓ S Pinned ✓ My Works	Summary Details	Marketing Details Statistics Ma	arketing Activities Related			
步 Dashboards	CAMPAIGN	* New App Release - Marketin	Marketing Activities	:	MARKETING LISTS	<u> </u>
Marketing Activities Customers	台 Currency	* 💩 Euro	Abellonan Schultz Open		Silverwoods Conterence Leads	
Contacts			Click https://twitter.com/inogic			
Marketing	SCHEDULES		Abellonan Schultz Click https://www.inogic.com/product/produ			
Marketing Lists	A Proposed End		Abellonan Schultz Click https://docs.incodic.com/marketing4/dvn	ŧ	Recipients (Campaign)	1
Settings	Actual Start	🗇	K ← Page 1	<i>→</i>	Sana Shamon SanaAadabShamon@protonmail.com Sent	i i
SetupAudiences	습 Actual End	🖻			LuisSousa Martins LuisSousaMartins1981@hotmail.com Hard	ł

- Here, a summary of the campaign will be available which will include the following details -
 - **Recipients:** It displays the list to whom the mails have been sent and its status.

Recipients (Campaign)	:				
Sana Shamon SanaAadabShamon@protonmail.com Sent	÷				
LuisSousa Martins LuisSousaMartins1981@hotmail.com Hard	÷		Compoigns	,	
Abellonan Schultz abellonanschultz@aol.com Sent	:		All campaigns	< C	New App Release
Roy Harper royharperhood@gmail.com Sent	:	83 •••	Email templates Reports		Overview Activity ∽ Click Perform

- Marketing Lists: The Marketing List associated with the campaign. For example, If the campaign is sent to the whole audience then the campaign gets associated with the Marketing List in CRM where the Audience lookup value is equal to the Audience of Mailchimp. If the campaign is sent to the particular Tag members then the campaign gets associated with the Marketing List in CRM where Audience Lookup is the Mailchimp Audience and Tag Lookup is equal to the Tag selected on the Campaign in Mailchimp. *Note: Marketing4Dynamics does not support the synchronization of Campaigns which has been sent to segments.*
- **Marketing Activities:** The list of activities tracked by the Mailchimp for that campaign. For example, who opened mail, who clicked on links, who unsubscribed, bounced mails, and to whom the mail was sent.
- In the 'Statistics' section, the following details will be available
 - **Open Rate:** The number of unique opens divided by the total number of successful deliveries.
 - **Unique Opens:** The number of unique opens.
 - **Opens:** The total number of opens for a campaign.
 - Successful Deliveries: The number of recipients who successfully received the mail.
 - Click Rate: The number of unique clicks divided by the total number of successful deliveries.
 - **Unique Clicks:** The number of unique clicks.
 - Clicks: Total number of clicks on the links by the recipients.

	Dynamics 365 Marketing4Dynamics: Mailchimp Integ	P & P + P
=	← 🗄 🖬 Save & Close + New 🔓 Deactivate 🗊 Delete 🖒 Refresh	S Check Access □ Copy as Campaign □ Copy as Template
	New App Release - Marketing4Dynamics	8/16/2021 3:44 PMSyncedActiveLast Sync DateSync StatusStatus
<i>"</i> »	Summary Details Marketing Details Statistics Related	
X &	△ Open Rate (%) 100.0	△ Click Rate (%) 66.7
Ē	A # Unique Opens 3	A # Unique Clicks 2
\bigtriangledown	🗄 # Opens 4	🗄 # Clicks 6
۰,	Last updated: 8/16/2021 3:44 PM	Last updated: 8/16/2021 3:44 PM
(i)	Successful Deliveries 3	🗇 # Unsubscribes 0
IJ	Last updated: 8/16/2021 3:44 PM	Last updated: 8/16/2021 3:44 PM
e,		

• Further you can see the graphical representation of the above data.



• The same data will be available in Mailchimp without graphical representation.

E	Campaigns	<	New App Release - Marketing4Dynamics											
	All campaigns		Switch report 👻											
88	Email templates		Overview Activity Click P	erfo	rmance	Social E-	commerce	Inbox Analytics360						
€ E	Reports							,,						
e G			Opened											
			5											
台			Export As CSV											
			Email Address		Opens	First Name	Last Name	Address	Phone Number	Birthday	Member Rating	Last Cha		
Q			abellonanschultz@aol.com	>	1	Abellonan	Schultz	4996 Pine Garden Lane Alpharetta, GA 30201 USA	770-665-1965		****	8/13/21 4		
			royharperhood@gmail.com	>	1	Roy	Harper	3272 Memory Lane Sycamore, IL 60178 USA	815-895-8732		****	8/13/21 6		
			SanaAadabShamon@protonmail.com	>	2	Sana	Shamon	1828 Farnum Road New York, NY 10003 USA	212-375-7398		****	8/13/21 4		
			4									÷		

• In Contacts also, each record will show the marketing activities in its timeline.

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	Dynamics 365 Marketing	g4Dynamics: Mailchimp Integ								
=	← 🗉 🖬 Save 🛱 Sa	ave & Close 🕂 New 🗋 Deactivate	^ନ ୍ତି Connec	t ~	≔ Add to Marketing List	Assign	🖾 Email a Link	🗊 Delete	🖔 Refresh	ı Q
الله	Sana Shamon Contact									
4 ⁸⁸	Summary Marketing De	tails Related								
¢ ¢	CONTACT INFORMATIC	N		Timeli	ne			+	Y Ī≣	÷
ß	First Name +	Sana		و م	Search timeline					
5	Last Name *	Shamon		Ø 6	nter a note					0
¢. ∰	Email	Sana Aadab Shamon@protonmail.com	5	RH	New Version Released - Activity Type: Click https://www.inogic.com/pro	 Click2Export oduct/product 	t ivity-apps/click-2-e	xport-microsof	t-dynamics-c	i
e	Business Phone	212-375-7398	C		Closed		C	ate Created: 8/1	3/2021 4:29 PM	\sim
	Mobile Phone			RH	New Version Released - Activity Type: Click https://docs.inogic.com/clic	 Click2Export k2export 				
0	Fax				Closed		C	ate Created: 8/1	3/2021 4:29 PM	\sim
4	Address 1: Street 1	1828 Farnum Road		RH	New Version Released - Activity Type: Click https://twitter.com/inogic	- Click2Export				
	Address 1: Street 2				Closed		C	ate Created: 8/1	3/2021 4:29 PM	\sim
	Address 1: Street 3			RH	New Version Released - Activity Type: Open	- Click2Export	t r	ate Created: 8/1	3/2021 4 -29 PM	
	Address 1: City	New York			Clused	mon	L	are created, 0/1.	NEVEL THEY FIVE	
	Address 1: State/Province	NY		•	Contact: Created By Roy Ha	rper.		8/1:	3/2021 4:12 PM	

• After the sync is completed the 'Last Sync Time' will be populated in the 'Sync Campaigns' section. This workflow will run once every day updating the 'Last Sync Time' till the sync period is completed.

Sync C	Campaigns						×
Select Ma	ailchimp Campaign that you	want to sync to CRM.					
Search	Campaigns						
	Campaign Name	Campaign Sent On ↑	Auto Sync Activities	Last Sync Time	Status		
	New Vector Released - Clic.	8/13/2021	30 days from campaign sent	8/17/2021 3:44 PM	Synced	Sync Now	
	him Appliance - Natoriu -	8/13/2021	30 days from campaign sent	8/17/2021 3:44 PM	Synced	Sync Now	
	Campaign Name New Next Palaeted - Clic. New App Tolence - Karlerin.	Campaign Sent On ↑ 8/13/2021 8/13/2021	Auto Sync Activities 30 days from campaign sent 30 days from campaign sent	Last Sync Time 8/17/2021 3:44 PM 8/17/2021 3:44 PM	Status Synced Synced	Sync Now Sync Now	

Sync Jobs

Whenever you synchronize the data between Dynamics 365 CRM and Mailchimp, a Sync Job record is created for each of the records. Sync Job represents a sync request between Dynamics 365 CRM and Mailchimp.

You can easily view these jobs against the records that is synced either from Mailchimp to Dynamics 365 CRM or from Dynamics 365 CRM to Mailchimp by following the steps mentioned below:

Go to Marketing4Dynamics App \rightarrow Settings \rightarrow Sync Jobs.

E Dynamics 365	Marketir	ng4Dynamics: Mailchimp Integ			
=	÷	🛱 Show Chart 🛍 Delete 🔿	~	🕐 Refresh	🖾 Email a Link
Customers	S	uccessful Sync Jobs ${ imes}$			
Contacts	~	Name 🗸	Syn	ic Status \checkmark	Source \checkmark
6		Sync job for contact	0	Success	Marketing
Marketing		Sync job for contact	Ø	Success	Marketing
Marketing Lists		Sync job for contact	ø	Success	Marketing
∽ Campaigns		Sync job for contact	Ø	Success	Marketing
Settings		Sync job for ikl_recipient	Ø	Success	Marketing
🗘 Setup		Sync job for ikl_marketingactivity	0	Success	Marketing
👪 Audiences		Sync job for ikl_recipient	Ø	Success	Marketing
Tags		Sync job for ikl_marketingactivity	Ø	Success	Marketing
Sync Jobs		Sync job for ikl_recipient	Ø	Success	Marketing
 Error Logs License Registration 		Sync job for ikl_marketingactivity	Ø	Success	Marketing

Contact							Subscriber Status	Owner
mary Marketing	Details Related							
nc Details								
I ld	67590745ba824e24ae76488e342a8e5e		Audience	💼 Wise Sc	dictions Sobs-Alasia			
Sync Status	Synced		🔒 Last Sync D	Pate 8/6/2021		10:20 PM		
ussessful Sums John					Č Refresh ₀/ª Flow ∨	🖩 Run Report 🔌	 M Excel Templa 	ates 🗸
secessial sync Jobs 🗸			Les autors	Les sue si	Descendent Law	L curre		
✓ Name ✓	Sync Status 🗸	Source 🗸	Submitted At V	Submitted by V	Processed At \$	Created	On 🗸	

									Roy Harper Owner	~
Sync job for contact										_
										_
🕅 Abia Tuma		Lead				Marketing Activity				
Wise Solutions Subscribers		Campaign				Recipient				
Success			~	Source	Marketing					
A Roy Harper				Submitted At	8/6/2021] 10:20 PM	6	
8/6/2021	10:20 PM		©							
	Sync job for contact Abia Tuma Vise Solutions Subscribers Success R Roy Harper 8/6/2021	Sync job for contact Abia Tuma Kise Solutions Subscribers Success R Roy Harper 8/6/2021 10:20 PM	Sync job for contact Abia Tuma Abia Tuma Mike Solutions Subscribers Success R Roy Harper 8/6/2021 1020 PM 1020 P	Sync job for contact Abia Tuma Abia Tuma	Sync job for contact Abia Turna Lead Campaign Success Success Ray Harper 8/6/2021 1020 PM Success Succes Success Succes Succ	Sync job for contact Abia Tuma Lead Campaign Success Success Success A Roy Harper A for Jo20 PM D 1020 PM D D D D D D D D D D D D D D D D D D D	Sync job for contact R Abia Tuma Lead Redpient Campaign Success Success R Roy Harper 86/2021 10 1020 PM C Success C Success C Success C Success C Succes C	Sync job for contact Abia Tuma Lead Abia Tuma Lead Abia Tuma Abia Tuma Abia Tuma Abia Tuma Abia Tuma Abia Tuma Abia Tuma Abia Tuma Abia Tuma Abia Tuma Abia Tuma Abia Tuma Abia Tuma Abia Tuma Abia Tuma Abia Tuma Ab	Sync job for contact Lead Marketing Activity R Abia Tuma Lead Marketing Activity Wise Solutions Subscribers Campaign Recipient Success	Sync job for context Lead Marketing Activity

- Entity Type: This section, specifies the type of record i.e., Contact, Lead, Marketing Activity, Marketing List, Campaign, Recipient and Tag associated with this job.
- Sync Status: This field denotes the status of the job. It can hold the following values:
 - Success The job request was successfully processed.
 - **Error** There was an error in processing the request. The Error Description will provide detailed information about error.
- **Source:** This field denotes the source system that generated this job. If it is Marketing, then the record is synced from Mailchimp to Dynamics 365 CRM; and if the source is CRM, then the record is synced from Dynamics 365 CRM to Mailchimp.
- **Submitted By:** The user who have synced the record between the two systems.
- **Submitted At:** The date and time when the syncing of record has taken place.
- **Processed At:** The time when the record is successfully synced following the direction specified by the user.
- **Error Description:** Error description would provide the information about error. You need to resolve the error for it to be re-processed by the service.

What triggers a job request?

A new Sync Job request is created when one of the following actions is performed in Dynamics 365 CRM:

1) When Sync Now button is pressed while syncing an Audience.

	Audience Name ↑	Marketing List	Last Sync Time	Status	
\bigcirc	Were Solidious Subreations	Wise Solutions Substrates	8/6/2021 10:20 PM	Synced	Sync Now

2) When Sync button is clicked on a marketing list.

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🖬 Save 🛱 Save & Close 🕂 New	🖉 Sync 🗋 Deactivate	🗓 Delete 🕐 Refresh 🤇	Check Access 🗄 Process	✓ g ^Q Manage Members ↓ ✓	🔍 Assign 🖻 Share 🖼 E	imail a Link 🛛 Flow 🗸 🗄	
Vise Solutions Conference Leads arketing List						Sync Status Last Sync Date	Roy Harper Owner
ummary Members Notes Related							

~		🔚 Save	📓 Save & Close	$+ \mathrm{New}$	🕄 Sync Now	Deactivate	🗊 Delete	🖔 Refresh	🔍 Check Access	🛱 Process 🖂	${\rm g}^{\rm Q}$ Manage Members $~ ~ \sim$	워, Assign	🖻 Share 🛛	🛿 Email a Link 🛛 🔊 Fle	w ~ :	
Wis Marl	e So eting	List	Subscribers										Synced Sync Statu:	8/6/2021 10:20 PN Last Sync Date	Roy Harper Owner	~

4) When Sync Now button is pressed while syncing a Campaign.

	Campaign Name	Campaign Sent On \uparrow	Auto Sync Activities	Last Sync Time	Status	
\bigcirc	Anna Campziya	7/22/2021	30 days from campaign sent	8/9/2021 10:39 PM	Synced	Sync Now
	Castiling Company	7/22/2021	30 days from campaign sent	8/9/2021 10:39 PM	Synced	Sync Now

5) When a new tag is created in CRM.

CRM Conference Tag General Marketing Details Related		 Last Sync Date	Roy Harper Owner	~
≙ ld	Audience 👘 👗 Wise Volutions Subacilians			
A Sync Status In Progress				

6) When a new interest/group is created in CRM.

CRM Conference - Sa Interest Category	ved			Last Sync Date
General Marketing Det	Alls Related V			
Id		Audience	all Company Connect	
Sync Status	In Progress	Category Type	Checkboxes	

7) When a new interest/ group category is created in CRM.

Conference 2024 - Sa Interest General Marketing Det	ails Related \checkmark			 Last Sync Date	~
New Section	-				_
Id		Audience	tin Company Transit		
Sync Status	In Progress	Category ID	CRM Conference		

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- 8) When Mailchimp-related fields (first name, last name, business phone & so on) are updated on Contact/Lead which is a member of any marketing list that has Sync Status as synced.
- 9) On update of any synced record, a new sync job will be created.

Field Mappings

Marketing4Dynamics synchronizes data between Dynamics 365 and Mailchimp. Individual fields of the records from Dynamics 365 CRM are mapped to relevant fields of the records in Mailchimp for error-free data synchronization. Here, we will describe the field mappings for the following entities:

- Contact
- Lead
- Campaign
- Audience
- Tag
- Interest/ Group
- Interest/ Group Category
- Marketing Activity

Contact

In this section, you will see how mapping for Contact entity is done.

Mappings For Contact			
Sr.No.	CRM Attribute Name	Mailchimp Attribute Name	Description
1	Id	id	id field of the member will be mapped in Id field of Contact in CRM
2	Email	email_address	email_address field of member will be mapped in Email field in CRM
3	Email Type	email_type	email_type field of member will be mapped in Email Type field in CRM
4	Subscriber Status	status	status field of member will be mapped in Subscriber Status field in CRM
5	Unsubscribe Reason	unsubscribe_reason	unsubscribe_reason field of member will be mapped in Unsubscribe Reason field in CRM
6	First Name	FNAME	FNAME of member will be mapped with First Name in CRM
7	Last Name	LNAME	LNAME of member will be mapped with Last Name in CRM

8	Opted In IP Address	ip_opt	<pre>ip_opt will be mapped with Opted In IP Address in CRM</pre>
9	Opted In Date	timestamp_opt	timestamp_opt will be mapped with Opted In Date in CRM
10	Member Rating	member_rating	member_rating will be mapped with Member Rating in CRM
11	Language	language	language of member will be mapped with Language in CRM
12	VIP	vip	vip of member will be mapped with VIP in CRM (Boolean)
13	Email Client	email_client	email_client of member will be mapped with Email Client in CRM
14	Source	source	source of member will be mapped with Source in CRM
15	Business Phone	phone	phone of member will be mapped with Business Phone in CRM & vice versa
16	Address 1: Street 1	addr1	addr1 of member will be mapped with Address1: Street 1 in CRM
17	Address 1: City	city	city of member will be mapped with Address1: City in CRM
18	Address 1: State/Province	state	state of member will be mapped with Address1: State/Province in CRM
19	Address 1: ZIP/Postal Code	postalcode	postalcode of member will be mapped with Address1: ZIP/Postal Code in CRM
20	Address 1: Country/Region	country	country of member will be mapped with Address1: Country/Region in CRM
21	Audience	list_id	list_id of member will be mapped with Audience in CRM

Lead

In this section, you will see how mapping for Lead entity is done.

Mappings For Lead			
Sr.No.	CRM Attribute Name	Mailchimp Attribute Name	Description
1	Id	id	id field of the member will be
			mapped in Id field of Lead in CRM
	Email	email_address	email_address field of member
2			will be mapped in Email field in
			CRM
3	Email Type	email_type	email_type field of member will
			be mapped in Email Type field in
			CRM

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4	Subscriber Status	status	status field of member will be mapped in Subscriber Status field in CRM
5	Unsubscribe Reason	unsubscribe_reason	unsubscribe_reason field of member will be mapped in Unsubscribe Reason field in CRM
6	First Name	FNAME	FNAME of member will be mapped with First Name in CRM
7	Last Name	LNAME	LNAME of member will be mapped with Last Name in CRM
8	Opted In IP Address	ip_opt	<pre>ip_opt will be mapped with Opted In IP Address in CRM</pre>
9	Opted In Date	timestamp_opt	timestamp_opt will be mapped with Opted In Date in CRM
10	Member Rating	member_rating	member_rating will be mapped with Member Rating in CRM
11	Language	language	language of member will be mapped with Language in CRM
12	VIP	vip	vip of member will be mapped with VIP in CRM (Boolean)
13	Email Client	email_client	email_client of member will be mapped with Email Client in CRM
14	Source	source	source of member will be mapped with Source in CRM
15	Business Phone	phone	phone of member will be mapped with Business Phone in CRM & vice versa
16	Street 1	addr1	addr1 of member will be mapped with Street 1 in CRM
17	City	city	city of member will be mapped with City in CRM
18	State/Province	state	state of member will be mapped with Address1: State/Province in CRM
19	ZIP/Postal Code	postalcode	postalcode of member will be mapped with ZIP/Postal Code in CRM
20	Country/Region	country	country of member will be mapped with Country/Region in CRM
21	Audience	list_id	list_id of member will be mapped with Audience in CRM

Campaign

In this section, you will see how mapping for Campaign is done.

Mappings for Campaign			
Sr.No.	CRM Attribute Name	Mailchimp Attribute Name	Description
1	Id	id	id of the campaign will be mapped in Id field of Campaign in CRM
2	Name	title	title of the campaign will be mapped in Name field of Campaign in CRM
3	Open Rate (%)	NA	Automatically calculated based on marketing activities. The number of unique opens divided by the total number of successful deliveries .
4	Click Rate (%)	NA	Automatically calculated based on marketing activities. The number of unique clicks divided by the total number of successful deliveries.
5	# Unique Opens	NA	Automatically calculated based on marketing activities. The number of unique open activities per member for that campaign.
6	# Unique Clicks	NA	Automatically calculated based on marketing activities. The number of unique click activities per member for that campaign.
7	# Opens	NA	Automatically calculated based on marketing activities. The total number of open activities for that campaign.
8	# Clicks	NA	Automatically calculated based on marketing activities. The total number of click activities for that campaign.
9	Successful Deliveries	NA	Automatically calculated based on marketing activities. The total number of sent activities for that campaign.
10	# Unsubscribes	NA	Automatically calculated based on marketing activities. The total number of unsubscribe activities for that campaign.

Audience

In this section, you will see how mapping for Audience is done.

Mappings for Audience				
Sr.No.	Sr.No. CRM Attribute Name Mailchimp Attribute Name Description			

1	Id (MailChimp)	id	id of Audience will be mapped withId (MailChimp) in CRM
2	Rating	list_rating	list_rating of Audience will be mapped with Rating in CRM
3	Name	name	name of Audience will be mapped with Name of Audience in CRM

Tag

In this section, you will see how mapping for Tag is done.

Mappings for Tag			
Sr.No.	CRM Attribute Name	Mailchimp Attribute Name	Description
1	Id	id	id of the tag will be mapped in Id
			field of Tag in CRM
2	Audience	list_id	list_id of the Tag will be mapped
2			with Audience in CRM
3	Name	name	name of the Tag will be mapped
			with Name of Audience.

Interest/ Groups

In this section, you will see how mapping for Interests is done.

Mappings for Interest				
Sr.No.	CRM Attribute Name	Mailchimp Attribute Name	Description	
1	Id	id	id of the tag will be mapped in Id	
	iu		field of Interest in CRM	
n	Audience	list_id	list_id of the Interest will be mapped	
2			with Audience in CRM	
3	Name	name	name of the Interest will be mapped	
			with Name of Audience.	

Interest/ Group Category

In this section, you will see how mapping for Interest Category is done.

Mappings for Interest				
Sr.No.	CRM Attribute Name	Mailchimp Attribute Name	Description	
			id of the tag will be mapped in Id	
1	Id	id	field of Interest/ Group Category in	
			CRM	
2	Audience	list_id	list_id of the Interest will be mapped	
			with Audience in CRM	
3	Name/ Title	name	name of the Interest will be mapped	
			with Name of Audience.	

4	Category Type	category type	category type of the Interest will be mapped based on selection between Checkboxes Dropdown
			• Radio
			Hidden

Marketing Activity

In this section, you will see how mapping for Marketing Activity is done.

Mappings for Marketing Activity			
Sr.No.	CRM Attribute Name	Mailchimp Attribute Name	Description
1	Activity Type	action	action field of Email Activity will
Ţ	Activity Type	action	field of Member Activity in CRM
2	Link Clicked	url	url field of Email Activity will be mapped with Link Clicked field of Marketing Activity in CRM in case of Click Activity
3	Campaign	campaign_id	campaign _id of Email Activity will be mapped with Campaign field in CRM
4	Regarding	email_id	email_id of Email Activity will be mapped with Contact/Lead field in CRM
5	IP	ір	ip of Email Activity will be mapped with IP field in CRM in case of Open/Click Activities

Sync Mailchimp Audiences, Members, Groups and Tags to CRM

Mailchimp Audience is where all your contacts/members, interests/groups, and tags are stored. Marketing4Dynamics allows you to sync Mailchimp's audience, interests/ groups, and tags, as well as its members, to Dynamics 365 CRM and map them to CRM marketing lists. With the help of this feature, users can now easily sync Mailchimp audiences to Dynamics 365 CRM.

Design, Sync, & Send Mailchimp Campaigns Within Dynamics 365

With **Marketing4Dynamics**, you can now create, send, track, sync, and analyze Mailchimp campaigns directly within Dynamics 365 CRM. With Dynamics 265 CRM - Mailchimp integration, you can create and manage campaigns directly from Dynamics 365 CRM without switching platforms. As your CRM contacts are synced with Mailchimp, you can easily add recipients and ensure accurate targeting. All campaign activities, engagement metrics, and performance insights are automatically updated, keeping your data consistent. This seamless workflow saves time, enhances efficiency, and enables data-driven decision-making, helping you optimize marketing efforts effortlessly.

Let's consider you are the Campaign Manager looking to send a marketing campaign from Dynamics 365 CRM, ensure that your CRM is connected to Mailchimp before proceeding.



Now, open your Dynamics 365 CRM environment where **Marketing4Dynamics** is already configured.

There are two ways to create a campaign.

From Setup Entity:

- Navigate to Marketing4Dynamics Mailchimp Integration.
- Click on Setup.
- Go to "Sync Campaign" and click on "Manage".

:::: Dynamics 365	Marketing4Dynamics: Mailchimp Integration	م	Q	+	∇	۲	?	Ф	Ø
=	Marketing4Dynamics - Mailchimp Integration Marketing4Dynamics helps to sync Marketing List and ensures that you have quick access to all marketing information such as campaigns, member activit	ties. Le	arn mor	,					
Customers	5, , , , , , , , , , , , , , , , , , ,								
O. Cantanta	Mailchimp Account - La								
× Contacts	MC © Connected								
👷 Leads	Reconnect to Mailchimp Account								
Marketing									
Marketing Lists	Sync Audiences Share Multipliere Material and to Description 365 CBM		Manag						
Campaigns	Learn more		Manag	e >					
Settings	Sync Marketing List/Members		Manac	0.5					
Setup	Learn more		manag	0 -					
Audiences		_			_	•			
I Tags	Choose Mailchimp campaigns that you want to sync to Dynamics 365 CRM.		Manag	e >					
Interest Category	Learn more								
🗔 Sync Jobs		_							
🔍 Error Logs									
License Registration									

Click on "+ New Campaign" to create a new campaign.

::: Dynamics 365	Marketing4Dynamics: Mailchimp Integra	ion				م	Q +	· V	۲	?	Ф	ţ
=	Marketing4Dvna	nics - Mailchi	mn Integratio	n								
යි Home	Sync Campaigns										\times	
🕓 Recent 🗸 🗸	Select Mailchimp Campaign t	nat you want to sync to CRN	Л.									
🖈 Pinned 🗸 🗸												
My Works	Search Campaigns				+ Ne	w Campaign						
券 Dashboards	Campaign Name	Campaign Sent On 1	Auto Sync Activities	Last Sync Time	Status						-	-
Marketing Activities	Sector Sector	10000	A rest of second sec	10.000	Synced	Sync Now						
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A Contacts	to the factory	10000	Low the second sec	10000	Synced	Sync Now						
👷 Leads	have a factor	1000		1.0.00	Synced	Sync Now						
Marketing	Series production and an open-	1000	Line and an angular	10000	Synced	Sync Now						
Marketing Lists	Text Displaying strengt	1000	$(1,1) \in \{1,2,3\} \setminus \{1,3,3\} \setminus \{1,3,3$	10.0010710	Synced	Sync Now						
Campaigns	Transfer Series	1000	100000000000000000000000000000000000000	1000	Synced	Sync Now						
Settings	Not far County on	10000	A department of the second second	10.000	Synced	Sync Now						
Setup	And an	10000	history and and	10000	Synced	Sunc Now						
Audiences						Sync Now					*	

From Campaign Entity:

Navigate to the **Marketing** tab in the sidebar and click on **Campaigns**.

Click on **New** to create a new campaign record.

	Marketing4Dynamics – User Manual
::: Dynamics 365 N	Marketing4Dynamics: Mailchimp Integration アロンディングロン クロンディング いち いっちょう アンジャン しょう ション ロー・ション ロー・シー・ション ロー・シー・ション ロー・シー ロー
≡	🗧 🖽 Focused view 🖾 Show Chart 🕂 New 🗊 Delete 🗸 🖒 Refresh 🚽 Visualize this view 🖾 Email a Link 🗸 : 😢 Share 🗸
Recent	W. New
✓ Pinned ∨	Marketing4Dynamics Campaigns - Create a new Campaign record. III Edit columns V Edit filters Pilter by keyword
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Marketing Activities	C Keening Keepingson Keleni.
Customers	
A Contacts	
🖉 Leads	
Marketing	
Arketing Lists	
🖘 Campaigns	
Settings	Rows: 2

Creating a New Campaign

Once you click on **New**, a campaign details form will open in your CRM. Fill in the required fields for successful campaign execution:

Note: You can access this form only when using Marketing4Dynamics.

E Dynamics 365	Marketing4Dynamics: Mailchimp Integration		Q	Ŷ	+	V	٢		Ð	Ø
ा Uasnboards	← □ 🖬 Save & Close + New 🕺 Flow ~									
Marketing Activities Customers	New Campaign	 Last Sync D	ate	 Sync S	itatus	New Campaig	n Status	Active Status	\sim	
♀ Contacts ☑ Leads	Campaign Details Marketing Details Statistics									
Marketing	Name *									
Campaigns	Recipients									
Settings	Audience * p									
 Audiences Tags 	From * Select an option V Display Name *									
Interest Category Sync Jobs	Subject *									
Error Logs License Registration	Content									
Help	Content Type *								\sim	

• **Name**: Enter a suitable name for your campaign.

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- Audience: Choose the target audience from your CRM, synced with Mailchimp, to define recipients.
- **Tag/Interest**: Select relevant tags or interests to ensure the campaign reaches the intended audience. You can select only one Tag at a time or can select multiple interests.

Tags	
Hot Leads Jan 2025	
Hot Leads Dec 2024	
Hot Leads Nov 2025	
New US Leads OCT 2024	
New UAE Leads SAP 2024	Select an option
Interests	
Cortana Daily Updates	
Cortana Weekly Updates	
Cortana Monthly Updates	
Cortana USA	
Cortana Europe	
Cortana Asia	

- From: Choose a valid email address that has been verified and authenticated in Mailchimp.
- **Display Name**: Provide the name to appear as the sender of the campaign.
- **Subject**: Add an engaging subject line for your campaign.

Dynamics 365 Ma	keting4Dynamics: Mailchimp Integration	م	Q	+	∇	٢	?	Ф	ß
≡ ≆≂ ∪asnboards	← □ □ □ □ Save 00 ² Save & Close + New ⊗ Flow ∨								
Marketing Activities Customers	New Campaign - Unsaved	 Last Sync Date	 Sync St	atus	New Campaign	Status	Active Status	\sim	
Contacts	Campaign Details Marketing Details Statistics								
Marketing	Name Cortana Marketing Campaign								
Marketing Lists Campaigns	Recipients								
Settings	Audience Cortana Pvt. Ltd. × , Tag/Interests Select an option							\sim	
Setup Audiences Tags	From * Display Name * Kunal Patel								
Interest Category Sync Jobs From Logs	Subject Boost Your CRM Experience with Cortana!!!								
 Error Logs License Registration 	Content								
Help	Content Type * Email Template							\sim	
User Manual Docs	Email Template * Select an option							~	

Defining Campaign Content Type

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In the campaign details form, you can choose the **Content-Type** for your campaign:

8 Contacts				
🖉 Leads	Subject	* Cartara Navi Vara Offara		
Marketing	Subject	✓Select		
Marketing Lists	Content	Email Template		
Campaigns	content	Email Body	_Ռո	
	Content Type	*Select	0	\checkmark
Settings				

• **Email Template:** Choose an existing or pre-approved email template for your campaign, fetched directly from Mailchimp's email templates.

Mandaratinan	Content									
warketing										
Arketing Lists	Contant Tuna	*				14				
	Content type	Email I	emplate							\sim
S Campaigns	Email Template	*								
	entail templat									~
Settings										
III Dynamics 365 Ma	rketing4Dynamics: Mailchimp In	ntegration				م	Q +	- 7 (€ ﴿	Ф <mark>Б</mark>
=										
ৰদ Dasnboards	← □ ₩ Save	j² Save & Close + New 2	Ø Flow ∨							
Marketing Activities								_		
Customers	New Campaign - Un	nsaved				2/7/2025 8:00 AM Last Sync Date	Synced Sync Status	New Campaign Sta	us Status	e 🗸
0. Contrato	Commission Dataila - Ma	destine Details - Chattation								
Contacts	Campaign Details Ma	inketing Details Statistics								
18 Leads										
Marketing	Name	* Cortana Marketing Campaig	n							
Arketing Lists										
Campaigns	Recipients									
Settings	Audience	* 🏭 Cortana Pvt. Ltd. ×		۵,	Tag/Interests	Select an option				~
Setup										
Audiences	From	- International Systems		~	Display Name	Kunal Patel				
Interest Category										
😨 Sync Jobs	Subject	Southern City Description	all consent							
🔍 Error Logs		Select an Option								
Dicense Registration	Content	Cortana Welcome Template								
	Content Tune	Cortana Marketing Templat	e							
Help	Content type	Cortana Product Template								~
User Manual Docs	Email Template	* Select an ontion								\sim

• Email Body: Easily create an email body that fits your campaign needs. Use rich text formatting and add your own content. You can also personalize emails with dynamic values from Mailchimp using merge tags.

<u>Click here</u> to learn how to use Mailchimp Merge Tags.



Next, click on the Marketing4Dynamics button in the ribbon bar and select Sync Now.

::: Dynamics 365	Marketing4Dynamics: Mailchimp Integration
=	To sync campaign details with Mailchimp, click on 'Sync Now' available in the 'Marketing4Dynamics Actions' button.
☆ Home③ Recent ∨	← □ 🖬 Save & Close + New 🥐 Marketing4Dynamics 💃 💪 Deactivate 🗎 Delete 🖒 Refresh 🗄 😢 Share -
☆ Pinned ∨ My Works	Cortana Marketing Campaign - Saved Campaign
분 Dashboards	Campaign Details Marketing Details Statistics Related ~
Marketing Activities	Content Type Email Body 🗸
Customers	Email Body
A Contacts	
😨 Leads	
Marketing	Dear [Customer's Name],
Arketing Lists	As we step into a new year niled with possibilities, Cortana is nere to make your 2024 originter: to celebrate, we re bringing you exclusive New Year offers that you won't want to miss.
🖘 Campaigns	Here's what we have in store for you:
Settings	Up to 25% off on our premium services.

The campaign status will update from "New" to "Draft," establishing a connection between Dynamics 365 CRM and Mailchimp.

Check Access :
M Sunced Draft Active
Sync Status Campaign Status Status
5

Once the syncing process is finished, the campaign details will be automatically updated in Mailchimp.

Note: After syncing, you can still edit the campaign details, and any changes will be automatically reflected in Mailchimp when you click "Save". Just ensure that your campaign status is set to Draft before making any changes.

Using Merge Tags in Mailchimp

- 1. In Mailchimp, your audience contains fields that hold information about your contacts.
- 2. Each audience field has a unique merge tag. A merge tag looks like a snippet of text wrapped in special characters: *[EXAMPLE]*.

		Q Search M	Mailchimp				Live expert
/ Create	Audience fi	elds and	d * MER	RGE * t	ags		
Campaigns ^	Here you can manage the Groups can also show up page.	e fields available o on signup form	to your audiend s but are edited	ce's <u>signup fo</u> on the audie	orms. ence's <u>groups</u>		
Automations ^	Field label and type		Required?	Visible?	Put this tag in your content:	Default merge tag value	
Overview All journeys	Email Address	email		2	* EMAIL * or * MERGEO *		
Pre-built journeys	First Name	text		~	* FNAME * or * MERGE1 *	Default merge tag valu	
Transactional email	Last Name	text		~	*] LNAME * or * MERGE2 *	Default merge tag valu	
All contacts	Address	address			*I ADDRESS * or * MERGE3 *		
Audience dashboard	Phone Number	phone			* PHONE * or * MERGE4 *	Default merge tag valu	
Signup forms	Phone format						
Tags	International	v					
Segments	Date visited	date	~	~	* MMERGE5 * or * MERGE5 *	Default merge tag valu	Ĩ
Surveys 🗸	Date format						

3. When you add a merge tag to your content, Mailchimp automatically replaces it with the information stored in the corresponding audience field.

For instance, if you use the *|EMAIL*/ merge tag, Mailchimp will insert the email address of each subscriber wherever you've placed the merge tag.

III Dynamics 365	Marketing4Dynamics: Mailchimp Integration $ ho$ Q + $ abla$ $ ho$
=	
My Works	
帶 Dashboards	Cortana Marketing Campaign - Unsaved 2/7/2025 8:00 AM Last Sync Date Sync Status Status
Marketing Activities	Campaign
Customer	Campaign Details Marketing Details Statistics Related \vee
Customers	Content
Contacts	Content
Kg Leads	Content Type * Email Body ~
Marketing	Email Body * 🔹 🗸 🎾 ∨ 🤤 Segoe UI - 🗸 11 - 🖪 I 🖳 G 💆 ∨ 📤 ∨ 🗄 🖽 🕀 🚍 🖽 🖙 Xa X* …
🛱 Marketing Lists	Hi *[FNAME]*,
🖘 Campaigns	Thank you for being a valued member of our community. We're excited to share the latest updates and offers with you.
Settings	Here's a quick summary of your account details from Dynamics 365 CRM:
Colum	Email Address: '[EMAIL]* Phone: 'IPHONEI*
Audiences	Address: "(ADDRESS)" We continuelly work to provide you with the best service possible
Tags	
B Interest Category	Send Time
🕞 Sync Jobs	

Preview Emails Before Sending Campaigns

Ensure your campaign emails are flawless before sending or scheduling them by utilizing the **"Preview"** button present under the Marketing4Dynamics button.

This allows you to review the email content, layout, and design exactly as your recipients will see it. By catching potential errors or making last-minute tweaks, you can ensure your emails deliver the intended impact and maintain a professional appearance.

Note: The Preview button will be available only after executing "Sync Now" and when the campaign status changes from New to Draft.

III Dynamics 365	Marketing4Dynamics: Mailchimp I	egration	ea eo e eo e
≡ My Works	← 🔲 🗗 🖬 Sa	e 🚰 Save & Close + New 🎯 Marketing4Dynamics 🗸 🗋 Deactivate 🗎 Del	lete 🕐 Refresh 🔍 Check Access 🗄 😢 Share 🗸
Dashboards Marketing Activities Customers	Cortana Marketing Campaign Details Summary C	Campaign - Saved Send a Test Email Sync Now Ampaign Details Marketing Details Statistics Related ~	2/7/2025 8:00 AM Synced Draft Active Last Sync Date Sync Status Campaign Status Status
♀ Contacts № Leads	Name	Cortana Marketing Campaign	
Marketing	Recipients		
Marketing Lists Campaigns	Audience	Cortana Pvt. Ltd. × , O Tag/Interests	Hot Leads Jan 2025 $\qquad \qquad \lor$
Settings	From	Display Name	Cortana Kim
Setup	Subject	Cortana Marketing Campaign	
Interest Category Sync Jobs	Content		

It will display the preview of mail as shown below:

	Dynamics 36	5 N	Aarketing4Dynar	nics: Mailchimp Integration	ې ک ر	+	7 🕸	?	@ "	ņ
=			MailChimp	Template Preview			e ×			
ŵ ⊦	Home			Dear [Customer's Name],				Ø	Share ~	
L R	Recent	\sim		As we step into a new year filled with possibilities, Cortana is here to make your 2024 brighter! To celebrate, we're bringing you exclusive New Y won't want to miss.	fear offers that you			Active	\sim	
s? ₽	Pinned	\sim		Here's what we have in store for you:				Status		
My W	Vorks			Up to 23% off on our premium services. Exclusive Sundies to halp you achieve your goals. Free trial extensions for new and returning users.						
28 N	Marketing Activit	tios		These offers are available for a limited time only, so don't wait too long!						
<i>Q</i> 11	Marketing Activity	iles		Claim Your Offer Now						
Custo	omers			Let Cortana assist you in making this year your most productive and successful yet.						
80	Contacts			Warm regards,						
ଟି ୮	Leads			The Cortana Team					~	
Marke	eting	I								
R N	Marketing Lists					_				
	Campaigns			This email was sent to <u>"ERANL"</u> why.stid.(oet.thia2 unsubactic from this its useful subactuation preferences "JLISTADDRESSLINE!"						
Settin	ngs									
🗘 s	Setup									

Test Mail Delivery with "Send a Test Email"

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Ensure reliable email delivery by using the **"Send a Test Email"** button present under the Marketing4Dynamics button.

This allows you to verify the accuracy of email settings and configurations by sending a test email to a specified recipient. It helps identify and resolve any potential issues before sending actual emails, ensuring smooth communication and preventing errors in live email interactions.

Note: The Send a Test Email button will be available only after executing "Sync Now" and when the campaign status changes from New to Draft.

Dynamics 365	Marketing4Dynamics: Mailchimp Ir	ntegration			م	Ω -	$+ \nabla$	₿ ?	Ð	ß
=	← 🛛 🖬 Sav	ve 💕 Save & Clos	se 🕂 New 🧬 Marketing4Dynamics \vee 🕞 Deactivate 📋 Delete	🖒 Refresh	🔍 Cheo	ck Access			🖻 Share -	
My Works										
新 Dashboards	Cortana Marketing	g Campaign - Sa	aved	2/7/2025 Last Sync D	8:00 AM ate	Synced Sync Status	Draft Campaign	Ac Status Sta	tive ∨ tus	
Marketing Activities	Campaign Details Summary C	ampaign Details	Marketing Details Statistics Related Y							
Customers		s	Send a Test Email	×						Ξ.
R Contacts	Name	Cortana Mark	Email Address							
NST Leads	Recipients		cortanakim@testmail.com Enter an email address to whom you would like to send a test email.							
Marketing Lists	Audience	🏜 Cortana Pi	Send Cancel	t Leads Ja	in 2025					
Settings	From	minumaticity	Display Name	Cortana Kim	1					
Setup	Subject	Cortana Marketir	ng Campaign							
 Tags Interest Category 	Content									
🗔 Sync Jobs	Control Toru									

Send/Schedule Email Campaign:

You can execute the campaign as per your date and time requirements.

Note: The **Send Time** will be available only after executing **"Sync Now"** and when the campaign status changes from **New** to **Draft**.

• Send Now:

When Should we send this email/Campaign?: For immediate execution, simply select the "Send Now" option to launch your campaign instantly.

Activities Sync Duration: Set how long (from 1 to 365 days) you want to sync campaign activities between Dynamics 365 CRM and Mailchimp. This helps ensure all important engagement data is captured within the selected time frame. A valid sync duration is required before you can send the campaign.

Note that entering a valid sync duration is mandatory to proceed with sending the campaign.

Comparing Dataila Mad				campaign status	Status				
Campaign Details Marketing Details Statistics Related \vee									
	As we step into a new year filled with possibilities, Cortana is here to	o make your 2024 brighte	r! To celebrate	e, we're bringing γο	u exclusive	-			
	New real ones that you won't want to miss.								
	O Up to 25% off on our premium services.								
Send Time									
When should we send this email/Campaign?	Send Now					\sim			
Activities Sync Duration	7								
	Send Time When should we send this email/Campaign? Activities Sync Duration	As we step into a new year filled with possibilities, Cortana is here to New Year offers that you won't want to miss. Here's what we have in store for you: Up to 25% off on our premium services. Send Time When should we send this email/Campaign? Activities Sync Duration 7	As we step into a new year filled with possibilities, Cortana is here to make your 2024 brighten New Year offers that you won't want to miss. Here's what we have in store for you: Up to 25% off on our premium services. Send Time When should we send this email/Campaign? Activities Sync Duration 7	As we step into a new year filled with possibilities, Cortana is here to make your 2024 brighter! To celebrat New Year offers that you won't want to miss. Here's what we have in store for you: Up to 25% off on our premium services. Send Time When should we send this email/Campaign? Activities Sync Duration 7	As we step into a new year filled with possibilities, Cortana is here to make your 2024 brighter! To celebrate, we're bringing yo New Year offers that you won't want to miss. Here's what we have in store for you: Up to 25% off on our premium services. Send Time When should we send this email/Campaign? Activities Sync Duration 7	As we step into a new year filled with possibilities, Cortana is here to make your 2024 brighter! To celebrate, we're bringing you exclusive New Year offers that you won't want to miss. Here's what we have in store for you: Up to 25% off on our premium services. Send Time When should we send this email/Campaign? Activities Sync Duration 7			

Execute the Campaign with Save

To send the campaign, click on the Save button. It will give you a pop-up to confirm the decision.

Sync Campaign	×
Are you sure you want to send this campaig If you proceed, the campaign will be synced sent to the selected recipients.	n now? to MailChimp and
Yes	No

While the campaign is under execution, the status of the campaign will be changed to "Sending".

Feature Note: The campaign will remain in the "sending" state until all email addresses are covered. Mailchimp will handle the sending of the emails, and the ideal time for sending each email may vary by 45 minutes in Mailchimp.

CRM Note: Please click on refresh to fetch the latest status of the campaign from Mailchimp.

			Marketing4Dynamics -	- Use	r Manu	al						
III Dynamics 365 Mai	keting4Dynamics: Mailchir	mp Inte	gration				م	Ŷ	+	7 🕸	?	e e
=		Save	👹 Save & Close 🕂 New 🧬 Marketing4Dynamics 🗸	Deactiv	vate 🗊 Delete	🖒 Refresh	🔍 Che	ck Access	:		1	Share ~
My Works 新 Dashboards 參 Marketing Activities	Cortana Market	ting	Campaign - Saved			2/7/202 Last Sync I	5 8:30 AM Date	Synced Sync State	ນຮ	Sending Campaign Status	Active _{Status}	~
Customers	Campaign Details	Mark	eting Details Statistics Related \checkmark									
Contacts	Name	• 🕀	Cortana Marketing Campaign		5							
Marketing	Recipients											
Arketing Lists	Audience	• 🙃	Lortana Pvt. Ltd.	Tag/Inter	ests * ć	Hot Leads J						
Settings	From	* 🖨	mkwood5656@gmail.com	Display N	lame * ć	Cortana Kir	n					
Setup	Subject	* 🖨	Cortana Marketing Campaign									
Tags Interest Category Sing John	Content											

Once execution is completed, the status of the campaign will be changed to "Sent".

E Dynamics 365 Ma	rketing4Dynamics: Mailchimp Integration		ې م	+	V 🕸	?	<i>⊕</i> ⊊	
=	-							
Marketine	← 🗄 🖾 🖬 Save 🛱 Save & Close + New 🛷 Marketing4Dynamics ∨	👌 Deactivat	e 🗎 De	lete :		Ċ	Share ~	
Marketing Lists	Cortana Marketing Campaign - Saved	2/7/2025 8:00	AM Sync	ed Se	ent ampaign Status	Active	~	
🖘 Campaigns	Campaign Summary Campaign Details Marketing Details Statistics Related \vee	Last Sync Date	Synce		impuign status	Journal		
Settings								
Setup	Name * [*] [©] Cortana Marketing Campaign							l
Tags	6							l
B Interest Category	Recipients							
🗔 Sync Jobs	Audience * 🗅 👪 👝 🛛 Tag/Interests	* 👌	Marketing,	Sales, HRM	1S			
🔍 Error Logs								
Icense Registrati	From * Display Name	* 🖯	James					
Help								

The campaign status will also be reflected in Dynamics 365 CRM, ensuring real-time synchronization.

Æ	Q Search Mailchimp	Help
Create	All campaigns	View analytics Create
▲ Home▲ Campaigns	Calendar	
All campaigns	Q Search campaigns ✓ Type: All ∨ Status: All ∨ Folder: All ∨ Date: All ∨ Clear	Sort by: Date edited 👻 🤟
Audience All contacts	Details Audience A Cortana Marketing Campaign	analytics Actions
Signup forms Upgrade	Avenue Unsaved segment 3 recipients	0.0% 0.0% Opens Clicks

• Schedule Campaign:

When Should we send this email/Campaign?: To schedule the campaign for later, simply select the "Schedule" option to launch your campaign on the designated date and time.

Delivery Time: Select the date and time on which you want to execute the campaign on Mailchimp.

Cortana Marketing Campaign	Cam	pai	gn	- Un:	ave	ł					2/7 Last	7/2025 8:00 AM t Sync Date	Synced Sync Status	Draft Campaign Status	Active Status	\sim
Campaign Details Marketing Details Statistics Related \vee																
	Jar	nuarj	y 20	25		\uparrow	\downarrow	2025			$\uparrow \downarrow$					
	Su	Mo	Tu	We	Th	Fr	Sa	Jan	Feb	Mar	Apr					
	29	30	31	1	2	3	4									
Send Time	5	6	7	8	9	10	11	May	Jun	Jul	Aug					
	12	13	14	15	16	17	18									
When should we send this	19	20	21	22	23	24	25	₿ Sep	Oct	Nov	Dec					~
email/Campaign?	26	27	28	29	30	31	1									Ť
Delivery Time *																
Activities Sync Duration	7															

Activities Sync Duration: Set how long you want to sync campaign activities between Dynamics 365 CRM and Mailchimp (from 1 to 365 days). This helps ensure all important engagement data is captured within the selected time frame. A valid sync duration is required before you can send the campaign.

To schedule the campaign, click on the **save** button. A confirmation prompt will appear; simply click **Yes** to initiate the campaign.



Once the campaign is successfully scheduled, the status will automatically update to **"Scheduled"**, ensuring a seamless workflow and timely campaign execution.

::: Dynamics 365	Marketing4Dynamics: Mailchimp Integration	P Q + 7 @ ? @ G
=	← □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □	🗘 Refresh 🛛 🖏 Check Access 🗄 🚺 🙆 Share 🧹
My Works Dashboards Marketing Activities	Cortana Marketing Campaign - Saved Campaign Campaign Details Marketing Details Statistics Related ~	2/7/2025 8:30 AM Synced Scheduled Campaign Status Status
Contacts	Name * Cortana Marketing Campaign	
Marketing	Recipients	
Marketing Lists	Audience * 🎄 Cortana Pvt. Ltd. × 🔎 Tag/Interests	Hot Leads Jan 2025
Settings	From * Display Name	Cortana Kim
Setup	Subject * Cortana Marketing Campaign	
Real Interest Category	Content	
🗔 Sync Jobs	Content Tune	

Campaign Performance Tracking

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Marketing4Dynamics provides users with a comprehensive performance matrix to evaluate the effectiveness of their marketing campaigns. By syncing campaign activities, users can ensure that their CRM data aligns seamlessly with their marketing platform.

Simply navigate to the **Marketing4Dynamics** button in the ribbon bar and click on "**Sync Now**". Once the syncing process is complete, the Sync Status updates to "**Synced**", confirming the successful integration.

E Dynamics 365	Marketing4Dynamics: Mailchimp Integration			γ Q	+ 7	ø	?	Ð	Ģ
≡ ⊠ Leads		Marketing/Dynamics	V Dearting	a 🗐 Dalat	. :		63	Share v	
Marketing	Cortana Marketing Campaign - Saved	New (P Warkeung4Dynamics	2/7/2025 8:00 AM Last Sync Date	In Progre Sync Statu	ess Sent s Campaig	n Status	Active Status	share V	
Campaigns	Summary Campaign Details Marketing Deta	ils Statistics Related \vee							
Setup	CAMPAIGN Name * එ	Marketing Activities	: ↑↓		NG LISTS			: ¢1	-
Tags Interest Category Sync Jobs	Cortana Marketing Campaign Currency * 습								I
Error Logs License Registrati	lndian Rupee	No data available	x		No data	available			
	SCHEDULES				.10 444				

The campaign performance data, including key metrics such as email open rates, click-through rates, and overall engagement, becomes readily accessible under the **Statistics** tab as shown below:

 Home A Home Recent Pinned Cortana Marketing Campaign - Saved Synced Synced<	🗰 Dynamics 365 🛛 Ma	rketing4Dynamics: Mailchim	p Integration		- ۵ م	F 7 🕸	? @ 🛱
Cortana Marketing Campaign - Saved Campaign 2/7/2025 8:00 AM Last Sync Date Sync ed Sync Status Sent Campaign Status Active Campaign Status Active Summary My Works Summary Campaign Details Marketing Details Statistics Related ✓ Image: Summary Campaign Details Marketing Details Statistics Related ✓ Image: Summary Campaign Details Marketing Details Click Rate (%) 0 0.0 Image: Summary Campaign Details Marketing Details Statistics Related ✓ Image: Summary Campaign Details Marketing Details Statistics Related ✓ Image: Summary Campaign Details Marketing 0.0 0.0 0.0 Image: Summary Campaign Details Marketing Image: Summary 0 0 0 Image: Summary Campaign Details 1 Image: Summary 0 0 0 0 0 Image: Summary Campaign Details 1 Image: Summary 0 0 0 0 0 0 0 0 0 0 0 0 0	Ⅲ 日本 Home	← 🗗 🔚 Save	🔊 Save & Close 🕂 New 🛷 Marketing4Dynas	nics 🗡 🛛 🗋 Deactivate	e 🛍 Delete 🖒 R	efresh :	🖄 Share 🗸
My Works Summary Campaign Details Marketing Details Statistics Related If Dashboards Image: Contact single	© Recent ∨ \$ Pinned ∨	Cortana Market ^{Campaign}	ing Campaign - Saved	2/7/2025 Last Sync D	8:00 AM Synced ate Sync Status	Sent Campaign Status	Active 🗸 Status
Image: Marketing Activities Open Rate (%) <u>33.3</u> Click Rate (%) <u>0.0</u> <u>0.0</u> Click Rate (%) <u>0.0</u> i i	My Works 튯 Dashboards	Summary Campai	gn Details Marketing Details Statistics Rela	ted ∨			
Customers # Unique Opens 1 # Unique Clicks 0 1 A Contacts # Opens 1 # Clicks 0 0 0 0 B Leads # Opens 1 # Clicks 0 <	Marketing Activities	Open Rate (%)	≙ 33.3	Click Rate (%)	⊕ 0.0		
A Contacts # Opens 1 # Clicks 0 Ist updated: Last updated: Last updated:	Customers	# Unique Opens	[≜] 1	# Unique Clicks	۵		
Marketing Successful Deliveries 3 # Unsubscribes 0 Parketing lists Last updated: Last updated. Last u	Contacts	# Opens Last updated:	8 1 1.1000 401 MA	# Clicks Last updated:	0		
# Unsubscribes - Number of unsubscribes tor this campaign	Marketing	Successful Deliveries Last updated:		# Unsubscribes Last up	0 Number of unsubscribes fo	r this campaign	

This feature empowers businesses to gain actionable insights, optimize future campaigns, and enhance their marketing ROI with ease.

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MailChimp Customer Journey Activity Syncing

Marketing4Dynamics enables Dynamics 365 CRM users to efficiently track and monitor activities from both automated and regular email campaigns within Dynamics 365 CRM. MailChimp Customer Journey (Activity syncing) helps maintain a comprehensive record of customer interactions, providing valuable insights into engagement and campaign performance.

Understand Mailchimp Customer Journey with an example.

A marketing team wants to improve their email campaigns by understanding how customers are engaging in real time. They set up a series of automated emails in Mailchimp that are sent based on what each customer does, like opening an email or clicking a link.

Now they can track these customer actions directly in Dynamics 365 CRM using this feature. This helps them adjust their emails, target the right people, and see what's working, all without switching between tools. It saves time and helps them get better results from their campaigns.

Let's explore how to capture and track email activities generated through Mailchimp Customer Journeys within Dynamics 365 CRM.

Note: Make sure your Marketing4Dynamics is properly connected to Mailchimp and your desired Mailchimp audience is synced, as this is essential for syncing marketing emails smoothly.



Note: Assign a unique name to each Mailchimp Customer Journey automated email campaign series as shown in below image to prevent confusion while auditing campaign performance.

Marketing4Dynamics – User Manual										
< 🚱	Tech Event Campaign Journey Audience: Test	Active	Live expert help Send Test Emails Vi	iew Report Pause & Edit						
∎0 Data	2	۲	Contact tagged Tech Event Visitors							
8 Settings			≓ Filter who can enter							
			Send Sent Opens							
		4	If/else conditions Email interaction > opened > Welcome Mail							
			Yes Conditions 1 No	¢€¢						
		end email Thank Sent Opens III	email Reminder 1 100.0%							

After executing the automated email campaign, track its performance in Mailchimp:

- Navigate to "All Journeys" under the "Automations" section.
- Here, you can see the campaign status and overall performance.

E		Q Search Mailchimp		• Live expert help
کیہ Campaigns All campaigns	^	All Journeys Choose •	Build from scratch	Choose pre-built journey
Automations	^	Q Search by name		
All journeys		Audience: Choose 🗸 Status: Choose 🗸	Objective: Choose V Clear all	Sort by: Last created 🗸
Pre-built journeys Transactional email		Active since 26 March 2025 Tech Event Campaign Journey	Started In Progress Completed 1 0 1	View Report v
E SMS New□ Forms	~ ~	Draft since 26 March 2025	Net activated pet.	(feet being v
Audience	^	Indiana 20 March 2020	Not activated pet	(nut tong v
Audience dashboard		Name in a West and	Santal in-Program Completed 1 0 1	(Ven Nyart)

After executing the automated email campaign, track its performance in Dynamics 365 CRM:

Syncing Automation Email Campaign Data in Dynamics 365 CRM

To fetch the latest campaign details in Dynamics 365 CRM:

- Navigate to **Setup entity** in Marketing4Dynamics.
- Click on Manage inside Sync Campaigns.



• Here, you can view all regular and automated emails that have been sent through Mailchimp.

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Campaign Type: For the customer journey insights e-mail campaigns, the Campaign type will be set by default to "Automation-Email," whereas for normal email/campaigns, it will be set as "Regular Email." **Regular Email:** It allows you to design and customize your email content, then choose to send it immediately or schedule it for later. This email type can be synced for up to 365 days.

Automated Email: Triggered by specific dates, events, or subscriber activities, automated emails help streamline marketing efforts. Use Customer Journey emails to apply tags, send targeted messages, and automate key tasks. Create a custom journey from scratch or choose from a variety of pre-built templates. By default, automated emails sync for 9,999 days, but you can change it to anywhere between 1 to 9,999.

Viewing Automation Email Campaign Statistics

To analyze the campaign performance in Dynamics 365 CRM:

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Contacts		Welcome Mail	Sent	A Automation-Email	1	1	100.0	2	1	100.0	Synce	d
Nal Leads			Sent	Automation-Email	2	1	100.0	3	1	100.0	Synce	d
Marketing		and the second se	Sent	🖂 Regular-Email	1	1	100.0	0	0	0.0	Synce	d
🛱 Marketing Lists			Sent	🖂 Regular-Email	1	1	33.3	0	0	0.0	Synce	d
G Campaigns			Sent	🖂 Regular-Email	1	1	33.3	0	0	0.0	Synce	d
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Audiences		Reminder Mail	Sent	Automation-Email	2	1	100.0	3	1	100.0	Syncer	d
BB Interest Category		1000	Sent	A Automation-Email	2	1	50.0	2	1	50.0	Synce	d
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• Navigate to the Campaign entity in Marketing4Dynamics.

- Open the **specific email campaign**. (For example, Reminder Mail).
- Go to **Summary Tab**: Updated recipients and respective latest activities will get synced here as per Mailchimp.

III Dynamics 365 Marketing4Dynamics: Mailchimp Integration 🗧 🔄 🗗 🕼 🖬 Save & Close + New 🧬 Marketing4Dynamics 🗸 🏠 Deactivate 🌐 Delete 🖒 Refresh 🔍 Check Access 🕃 Process 🗸 # Dashboards Marketing Activities Welcome Mail - Saved 4/3/2025 5:48 PM Synced Sent Last Sync Date Sync Status Campaign Status Automation-Email Campaign Type ~ Campaign Customers A Contacts C Leads CAMPAIGN Marketing Activities MARKETING LISTS Marketing ţĻ ţ↓ Select all Select all Name * 🗇 Welcome Mail 🗟 Marketing Lists ST Click AM 15 Currency * 🙆 🕼 Indian Rupee Campaigns Sync Activities Until 8/18/2052 Settings ST Click Setup SCHEDULES Audiences ST Open Tags Proposed Start ٥ B Interest Category ST Sent Proposed End ٥ G Sync Jobs Error Logs Actual Start ۵ 1 - 4 of 4 ${\rm id}~\leftarrow~{\rm Page}\,{\rm 1}~\rightarrow$ ${\rm Id}~\leftarrow~{\rm Page}\,{\rm 1}~\rightarrow$ 1 - 1 of 1 License Registration Actual End ٥ Help Recipients (Campaign) User Manual Docs Select all

• Open Statistics: Here, you will see a graphical representation of email performance, including open rates, Click-through rates, unsubscribes, etc.

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Marketing4Dynamics – User Manual



Note: Campaign statistics and recipient updates are automatically refreshed after every 24 hours interval.

Stop Syncing Automated/Regular Email Campaign Activities

For Single Mail:

If you want to stop syncing activities for a specific automation campaign, follow these steps:

- 1. Go to the "Campaign" entity in Marketing4Dynamics.
- 2. Open the campaign you want to stop synchronizing the email activities from Mailchimp.
- 3. Click on the **"Marketing4Dynamics"** button on the ribbon bar inside the synced campaign form.
- 4. Select "Stop Sync" to stop the synchronization of activities of the particular campaign.

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For Multiple Mails:

If you want to stop syncing activities for multiple campaigns at a time, follow these steps:

- Go to the Home grid of Campaign Entity.
- Choose the campaign emails for which you want to stop the activity syncing.
- Click on the **"Stop Sync"** button.

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Marketing		Sent	🖾 Regular-Email	1	1	33.3	0	0	0.0	Synced	4/3/2025 12:37 P	n.
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When you click **"Stop Sync,"** the Sync Status field will update to **"Paused,"** and campaign activities will no longer sync to Dynamics 365 CRM from Mailchimp.

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Note: To resume syncing campaign activities, simply follow the same steps and click "Sync Now" within the campaign form to restart the activity synchronization.

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Dashboard & Reporting

In the Dashboards section, comprehensive data on overall marketing activities carried out through Mailchimp is made available. With the graphical representation of data through charts and graphs it becomes easy to analyze the overall performance of different campaigns undertaken over a given period.

This analysis further helps in planning and developing marketing activities that pique the interest of the customers resulting in higher sales and profit.



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