



White Paper

Marketing4Dynamics - White Paper

Aim:

The aim of Marketing4Dynamics is to bridge the gap between CRM and Mailchimp and to provide both Sales and Marketing data on one platform i.e., within Dynamics 365 CRM.

Features:

- Supports syncing of Audience, Segments 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

Supported Versions

Versions: Microsoft Dynamics 365 v9.0 and above.

Deployment Models: Online.

Who needs it?

All the Sales & Marketing personnels will find this app handy. To plan and develop unique campaigns that piques the interest of the customers is what sales and marketing strives for. And to make this process smooth and easy it is necessary to have all the information at one place. With this app, sales team can be privy to marketing information from mailchimp such as success rate of campaigns, response received from members, and much more. This will further help them to plan and execute sales strategies which will increase sales and improve the overall growth of the organization.

Sync Audience & Segments

Provision to select and sync respective Mailchimp audience and segments to CRM. Users can further sync Tags and Members of that Audience to CRM and associate it with the Marketing List.

Sync Audiences

Select Mailchimp Audience that you want to sync to CRM. You need to map CRM Marketing List with Mailchimp Audience. Members will be added to selected Marketing List.

Search Audiences and Segments

Audience Name	Segment Name	Tags	Marketing List	Last Sync Time	Audience Status	
Wise Solutions Subscribers	...	...	Wise Solutions Subscribers Li	1/6/2022 9:17 AM	Synced	Sync Now
Wise Solutions Subscribers	Address Contents Canada	...	Wise Solutions Address Conte	1/6/2022 9:17 AM	Synced	Sync Now
Wise Solutions Subscribers	Clicked Last 5 Campaigns	...	...	1/6/2022 9:17 AM	Synced	Sync Now
Wise Solutions Subscribers	Created_12 November 2021	...	...	1/6/2022 9:17 AM	Synced	Sync Now
Wise Solutions Subscribers	Created on 16th Nov 2021	...	...	1/6/2022 9:17 AM	Synced	Sync Now

Save Save & Close Deactivate Delete Refresh Check Access Assign Share Email a Link Flow

Silverwoods Inc Synced 8/13/2021 4:12 PM Roy Harper

Audience Sync Status Last Sync Date Owner

General Marketing Details Related

Name Silverwoods Inc

Rating ☆☆☆☆☆

Tags Refresh

Name	Sync Status	Last Sync Date
Customers	Synced	8/13/2021 4:12 PM
Conference Leads	Synced	8/13/2021 4:12 PM
Online Sales	Synced	8/13/2021 4:12 PM
Partner	Synced	8/13/2021 4:12 PM

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Active Contacts (Marketing4Dynamics) ▾				
Full Name ↑ ▾	Email ▾	Company Name ▾	Business Phone ▾	Sync Status ▾ ▾
Abellonan Schultz	abellonanschultz@aol.com	---	770-665-1965	✓ Synced
Anke Schwartz	AnkeSchwartz@teleworm.us	---	617-973-7077	✓ Synced
Cerys Rice	CerysRice@jourrapide.com	---	603-448-0721	✓ Synced
Charles Blanchard	charlesblanchard564@gmail.com	---	---	✓ Synced
Frances Zoutendijk	FrancesZoutendijk@yandex.com	---	845-350-2337	✓ Synced
LuisSousa Martins	LuisSousaMartins1981@hotmail.com	---	612-216-2802	✓ Synced
Mackenzie Woodward	MackenzieWoodward1988@outlook.com	---	303-887-5516	✓ Synced
Roy Harper	royharperhood@gmail.com	---	815-895-8732	✓ Synced
Sana Shamon	SanaAadabShamon@protonmail.com	---	212-375-7398	✓ Synced
Zama Sheripov	zamasheripov@yahoo.com	---	646-542-6616	✓ Synced

Audience					
Audience dashboard					
All contacts					
Filter by Tags ▾ View Segment ▾ New Segment					
▼	Email Address	First Name	Last Name	Address	Phone Number
<input type="checkbox"/>	royharperhood@gmail.com	Roy	Harper	3272 Memory Lane Sycamore, IL 60178 USA	815-895-8732
<input type="checkbox"/>	CerysRice@jourrapide.com	Cerys	Rice	1232 Grasselli Street Lebanon, NH 03766 USA	603-448-0721
<input type="checkbox"/>	FrancesZoutendijk@yandex.com	Frances	Zoutendijk	2040 Benedum Drive Poughkeepsie, NY 12601 USA	845-350-2337
<input type="checkbox"/>	AnkeSchwartz@teleworm.us	Anke	Schwartz	3244 Rainy Day Drive Boston, MA 02114 USA	617-973-7077
<input type="checkbox"/>	LuisSousaMartins1981@hotmail.com	LuisSousa	Martins	3899 Lost Creek Road Minneapolis, MN 55401 USA	612-216-2802
<input type="checkbox"/>	abellonanschultz@aol.com	Abellonan	Schultz	4996 Pine Garden Lane Alpharetta, GA 30201 USA	770-665-1965
<input type="checkbox"/>	zamasheripov@yahoo.com	Zama	Sheripov	603 Canterbury Drive New York, NY 10011 USA	646-542-6616
<input type="checkbox"/>	MackenzieWoodward1988@outlook.com	Mackenzie	Woodward	1335 Roy Alley Denver, CO 80202 USA	303-887-5516
<input type="checkbox"/>	SanaAadabShamon@protonmail.com	Sana	Shamon	1828 Farnum Road New York, NY 10003 USA	212-375-7398
<input type="checkbox"/>	charlesblanchard564@gmail.com	Charles	Blanchard	Silverwoods Inc 2122 West Fork Street Sycamore, IL 60178 USA	---

Dynamics 365 | Marketing4Dynamics: Mailchimp Integ...				
Silverwoods Inc Subscribers				
Marketing List				
Summary Members Notes Related				
Members				
Add Refresh Quick Camp				
Full Name ↑ ▾	Email ▾	Company Name ▾	Business Phone ▾	Sync Status ▾
Abellonan Schultz	abellonanschultz@aol.com	---	770-665-1965	✓ Synced
Anke Schwartz	AnkeSchwartz@teleworm.us	---	617-973-7077	✓ Synced
Cerys Rice	CerysRice@jourrapide.com	---	603-448-0721	✓ Synced
Charles Blanchard	charlesblanchard564@gmail.com	---	---	✓ Synced
Frances Zoutendijk	FrancesZoutendijk@yandex.com	---	845-350-2337	✓ Synced
LuisSousa Martins	LuisSousaMartins1981@hotmail.com	---	612-216-2802	✓ Synced
Mackenzie Woodward	MackenzieWoodward1988@outlook.com	---	303-887-5516	✓ Synced
Roy Harper	royharperhood@gmail.com	---	815-895-8732	✓ Synced

Audience

Current audience

Silverwoods Inc ▾

Your audience has 7 contacts. 6 of these are subscribers.

Overview Manage contacts ▾ Add contacts ▾ Signup forms Preferences center Settings ▾ Inbox Surveys 🔍

Toggle Columns ▾ Export

Filter by Tags ▾ View Segment ▾ New Segment						
▼	Email Address	First Name	Last Name	Address	Phone Number	Birthday Tags
<input checked="" type="checkbox"/>	royharperhood@gmail.com	Roy	Harper	3272 Memory Lane Sycamore, IL 60178 USA	815-895-8732	Conference Leads
<input type="checkbox"/>	CerysRice@jourrapide.com	Cerys	Rice	1232 Grasselli Street Lebanon, NH 03766 USA	603-448-0721	Customers
<input type="checkbox"/>	FrancesZoutendijk@yandex.com	Frances	Zoutendijk	2040 Benedum Drive Poughkeepsie, NY 12601 USA	845-350-2337	Customers
<input type="checkbox"/>	AnkeSchwartz@teleworm.us	Anke	Schwartz	3244 Rainy Day Drive Boston, MA 02114 USA	617-973-7077	Conference Leads

Sync Marketing Lists (Contacts or Leads)

Sync CRM Leads and Contacts added to Marketing List in Dynamics 365 CRM to Mailchimp.

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Sync Tags

Create new tags in CRM and promote it to Mailchimp.

Conference Leads
Tag

8/13/2021 4:12 PM
Last Sync Date

General **Marketing Details** Related

Id	2238510	Audience	Silverwoods Inc
Sync Status	Synced		

Audience

Audience dashboard

All contacts

Signup forms

Tags

Segments

Surveys

Preferences center **New**

Inbox

Charles
Silverwoods Inc

Overview **Manage contacts** Add contacts

Tags

☐ Sort by Name

☐ **Conference Leads**
Created 8/13/21 4:57AM

☐ Customers
Created 8/13/21 4:58AM

☐ Influencer
Created 8/13/21 4:57AM

☐ Online Sales
Created 8/13/21 4:57AM

☐ Partner
Created 8/13/21 4:57AM

Design and Execute Campaign within Dynamics 365 CRM

With Marketing4Dynamics, you can now design, execute, track, and analyze Mailchimp campaigns directly within Dynamics 365 CRM.

Dynamics 365 Marketing4Dynamics: Mailchimp Integration

New Campaign - Unsaved

Last Sync Date Sync Status **New Campaign Status** Active Status

Campaign Details Marketing Details Statistics

Name Cortana Marketing Campaign

Recipients

Audience Cortana Pvt. Ltd. Tag/Interests Select an option

From email@example@gmail.com Display Name Kunal Patel

Subject Boost Your CRM Experience with Cortana!!!

Content

Content Type Email Template

Email Template Select an option

Dynamics 365 Marketing4Dynamics: Mailchimp Integration

To sync campaign details with Mailchimp, click on 'Sync Now' available in the 'Marketing4Dynamics Actions' button.

Home Recent Pinned My Works Dashboards Marketing Activities Customers Contacts Leads Marketing Marketing Lists Settings

Cortana Marketing Campaign - Saved

Last Sync Date Sync Status **New Campaign Status** Active Status

Campaign Details Marketing Details Statistics Related

Content Type Email Body

Email Body

Dear [Customer's Name],

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.

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Cortana Marketing Campaign - Unsaved
Campaign

2/7/2025 8:00 AM Last Sync Date Synced Sync Status Draft Campaign Status Active Status

Campaign Details Marketing Details Statistics Related

Send Time

When should we send this email/Campaign?

Delivery Time

Activities Sync Duration 7

Sync Campaigns

Sync all the campaigns in Mailchimp which has been sent to the subscribers to Dynamics 365 CRM.

Dynamics 365 | Marketing4Dynamics: Mailchimp Integ...

New App Release - Marketing4Dynamics Campaign 8/16/2021 3:44 PM Last Sync Date Synced Sync Status Active Status

Summary Details Marketing Details **Statistics** Related

Open Rate (%)	100.0	Click Rate (%)	66.7
# Unique Opens	3	# Unique Clicks	2
# Opens	4	# Clicks	6
Last updated:	8/16/2021 3:44 PM	Last updated:	8/16/2021 3:44 PM
Successful Deliveries	3	# Unsubscribes	0
Last updated:	8/16/2021 3:44 PM	Last updated:	8/16/2021 3:44 PM

Campaigns < New App Release - Marketing4Dynamics

Switch report

Overview Activity Click Performance Social E-commerce Inbox Analytics360

Opened

Export As CSV

Email Address	Opens	First Name	Last Name	Address	Phone Number	Birthday	Member Rating	Last Cha
abellonanschultz@wol.com	1	Abellon	Schultz	4995 Pine Garden Land Alpharetta, GA 30001 USA	770-665-1065		★★★★★	8/13/21 4
royharperhood@gmail.com	1	Roy	Harper	3272 Memory Lane Sycamore, IL 60178 USA	815 895 8/32		★★★★★	8/13/21 6
SanaAsad@sharon@protonmail.com	2	Sana	Sharon	1878 Fernum Road New York, NY 10003 USA	212-375-7366		★★★★★	8/13/21 4

MailChimp Customer Journey Activity Syncing

Track Mailchimp automated email campaigns in Dynamics 365 CRM with detailed customer engagement insights and performance analytics.

Dynamics 365 | Marketing4Dynamics: Mailchimp Integration

Welcome Mail - Saved Campaign 4/3/2025 1:48 PM Last Sync Date Synced Sync Status Automation-Email Campaign Type

Summary Campaign Details Marketing Details Statistics Related

CAMPAIGN

Name: Welcome Mail

Currency: Indian Rupee

Sync Activities Until: 8/18/2052

SCHEDULES

Proposed Start

Proposed End

Actual Start

Actual End

Marketing Activities

Click: https://www.bright.com/product/integrations/mailchimp-integ-map...

Click: https://www.bright.com/product/integrations/mailchimp-integ-map...

Open

Sent

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MARKETING LISTS

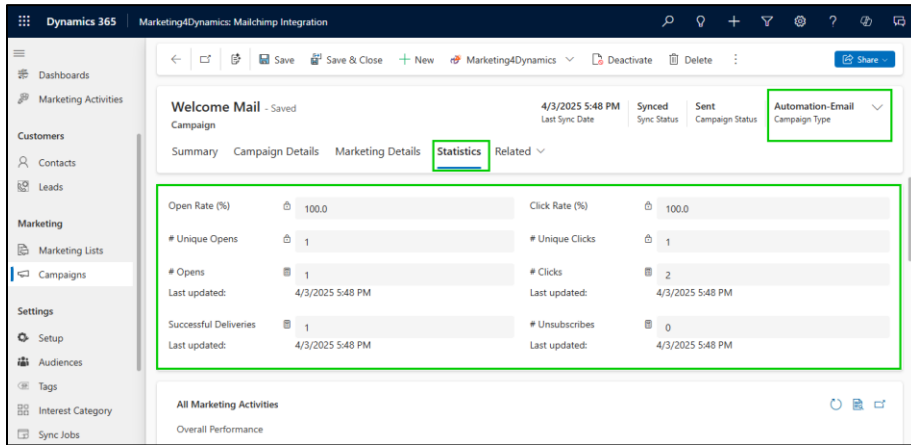
15

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Recipients (Campaign)

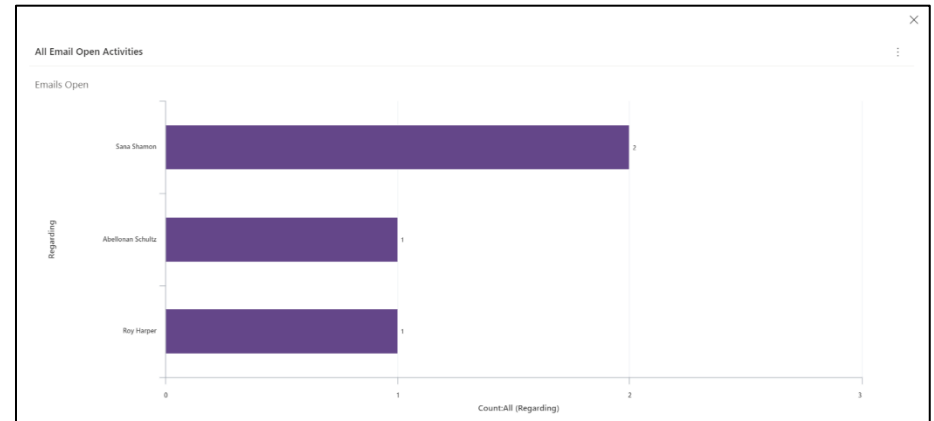
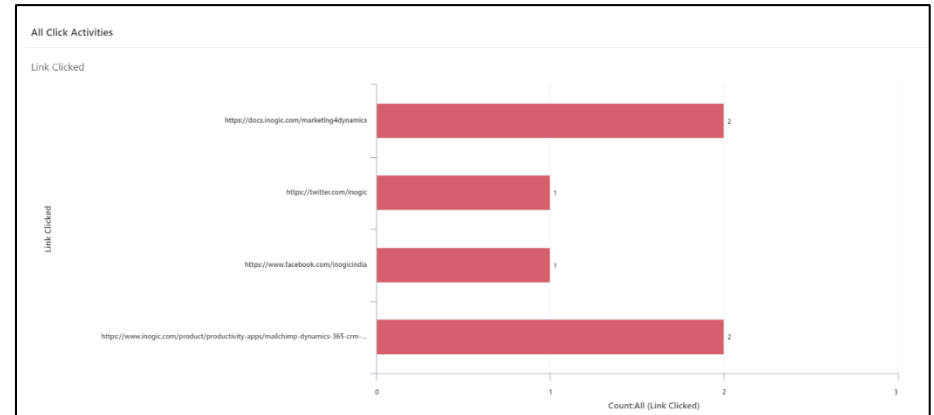
Select all

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Dashboard & Campaign Statistics

Analyze overall performances of different campaigns through graphs and charts in dashboards.



Contact Us

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