



## User Manual

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## Introduction

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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.

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## Security Roles

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Two Security roles are added with Marketing4Dynamics - **Marketing4Dynamics Administrator** and **Marketing4Dynamics 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.

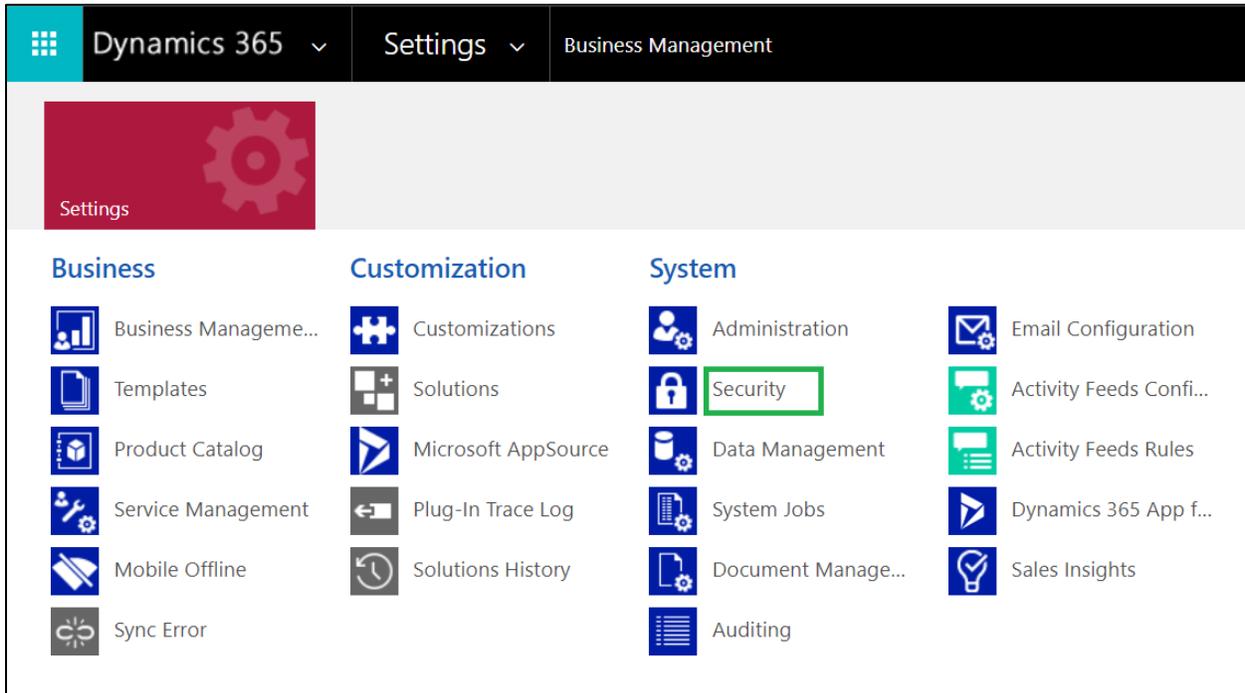
- **Marketing4Dynamics Administrator** – The user with **Marketing4Dynamics Administrator** security role is in charge of setting up and configuring the solution.

## Marketing4Dynamics – User Manual

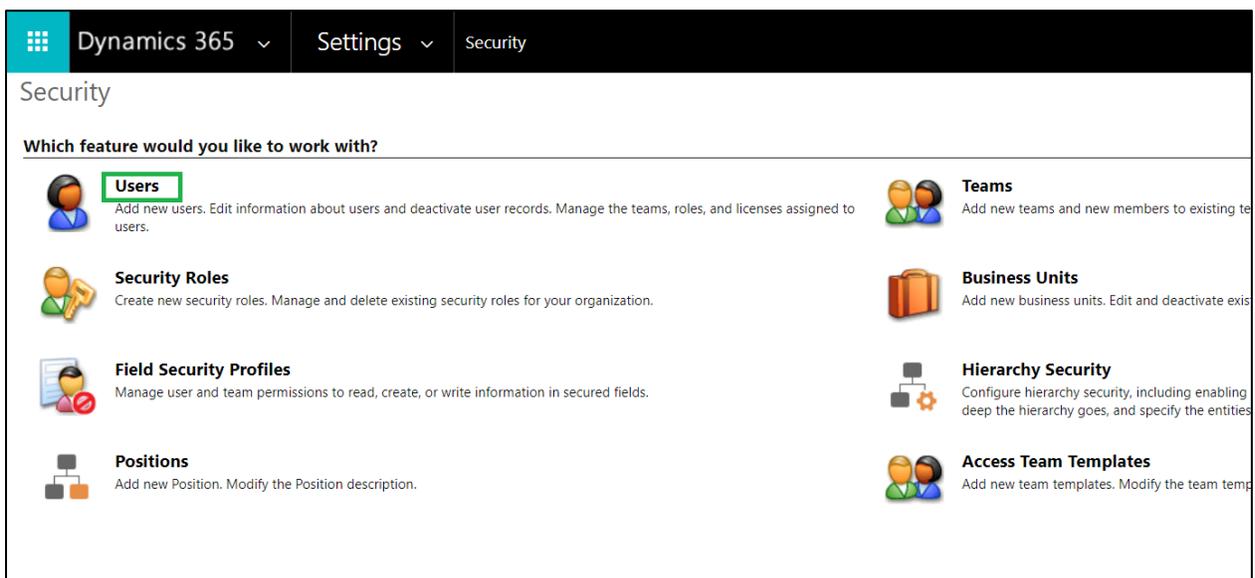
- **Marketing4Dynamics User** – The user with **Marketing4Dynamics User** security role will be in charge of working with members of Marketing List in CRM and will be able to view campaign statistics and marketing activities data synced from Mailchimp.

Here are the steps to assign security role to users.

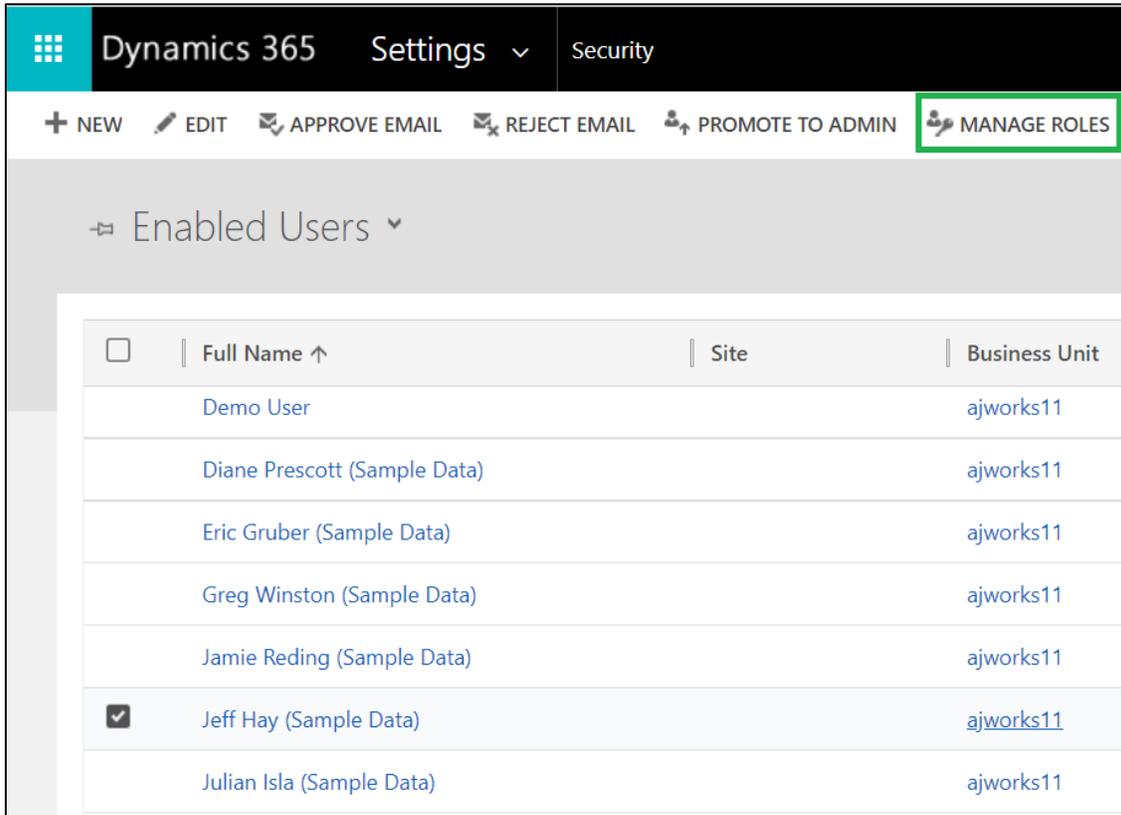
- Go to Advanced Settings --> Settings --> Security.



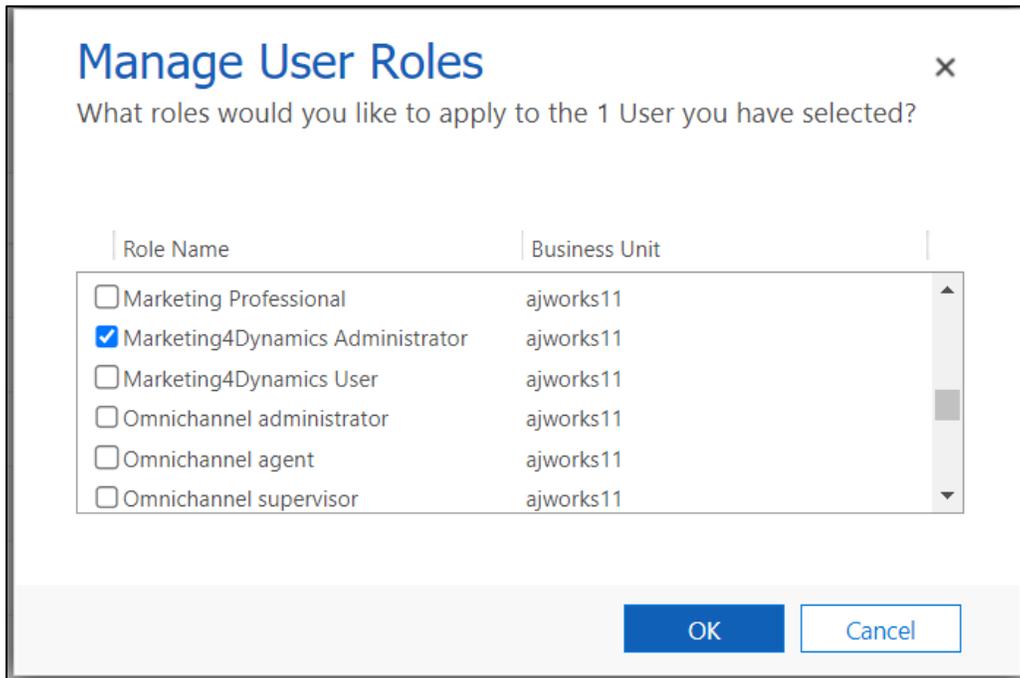
- Select Users.



- Select user --> Click on MANAGE ROLES.



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



## Setup

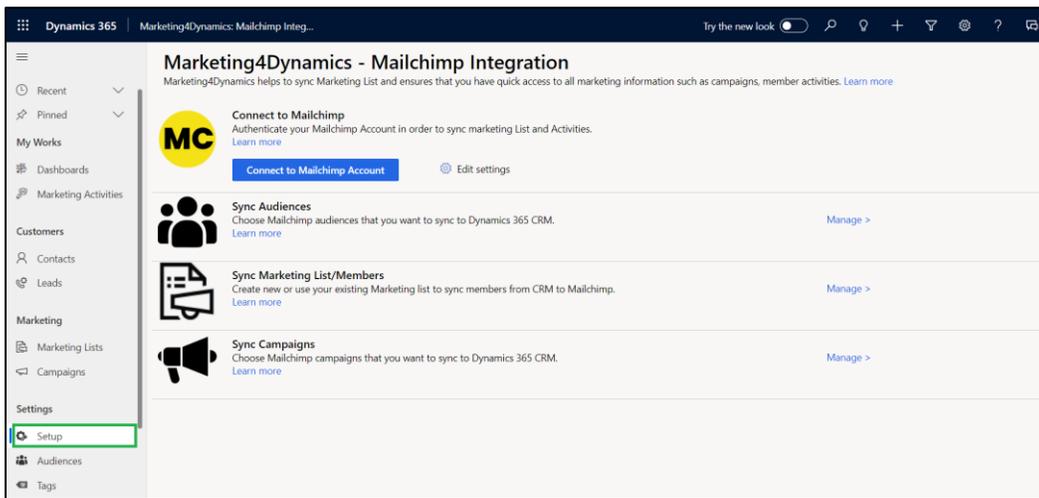
In the 'Setup' area there are 4 sections – **Connect to Mailchimp**, **Sync Audiences**, **Sync Marketing List/Members**, **Sync Campaigns**. To avail the benefits of Marketing4Dynamics, these sections should be successfully setup.

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

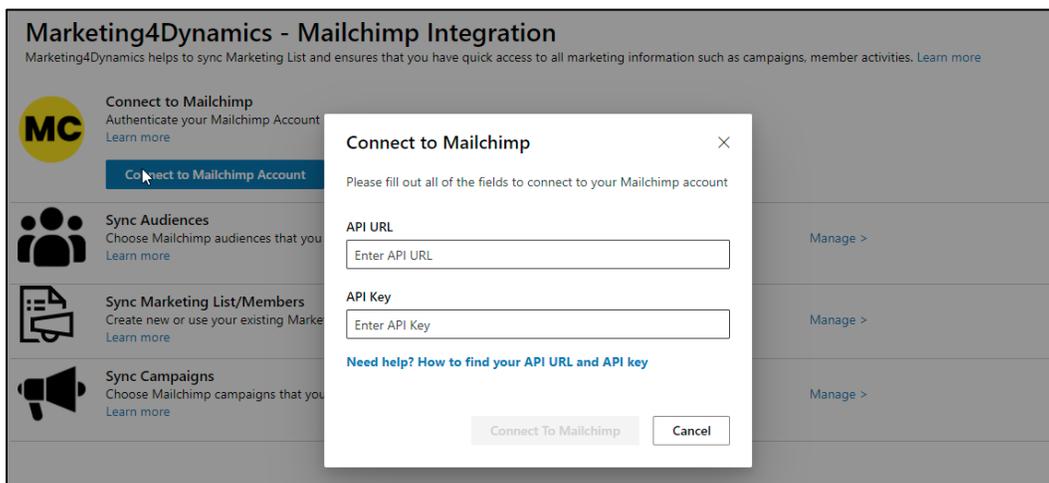
### Connect to Mailchimp

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

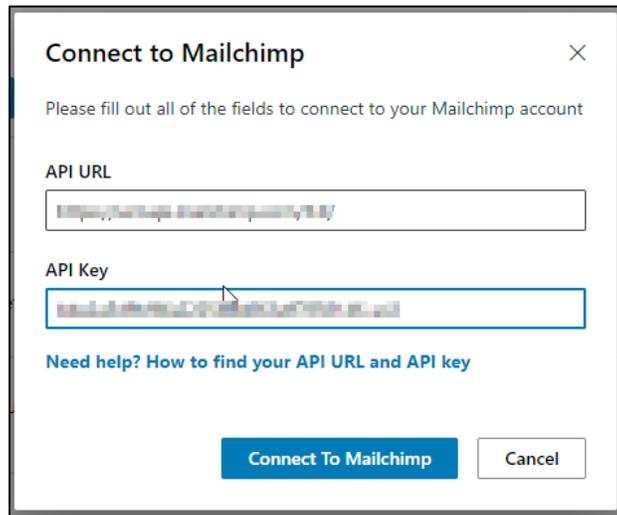
- First, go to **Marketing4Dynamics App → Settings → Setup**.



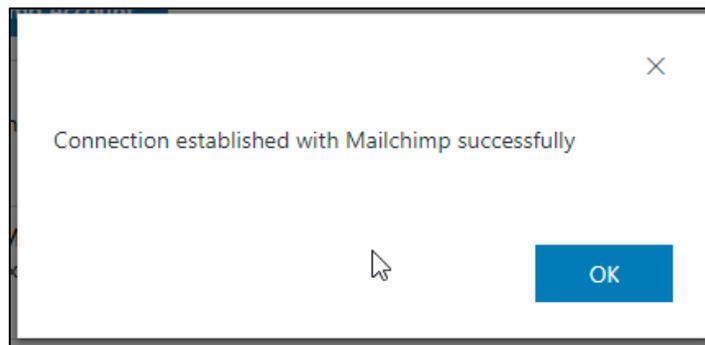
- Click on 'Connect to Mailchimp Account' → A dialog box will appear.



- Enter the [API URL and API key](#) in the dialog box → Click on ‘**Connect to Mailchimp**’.



- 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’.

### 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

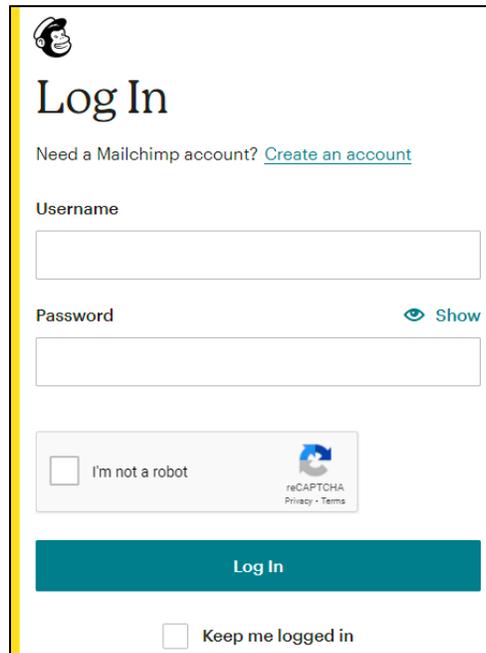
[Reconnect to Mailchimp Account](#) [Edit settings](#)

### 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.

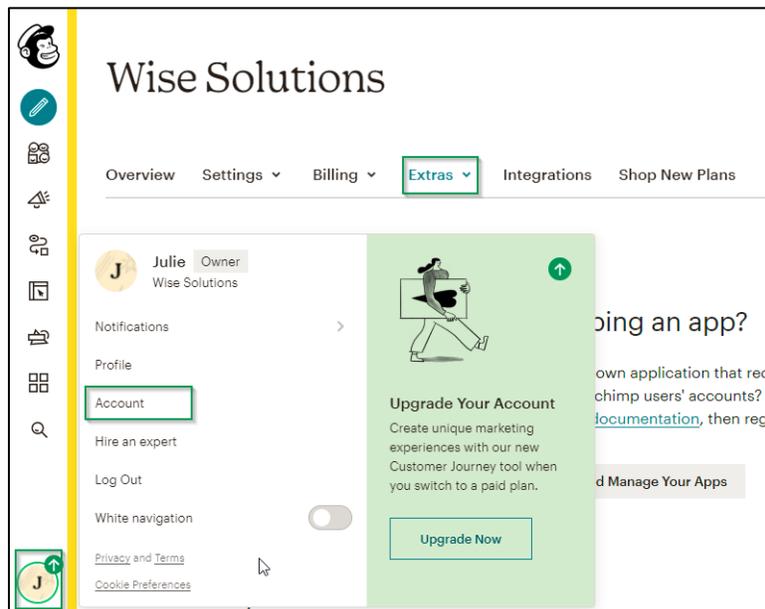
#### API Key:

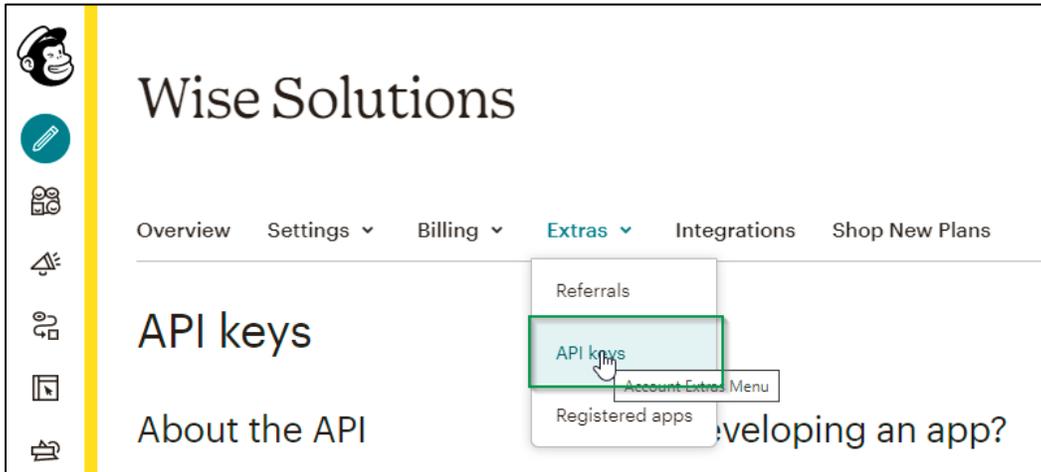
- Log into the existing Mailchimp account or create a new account.



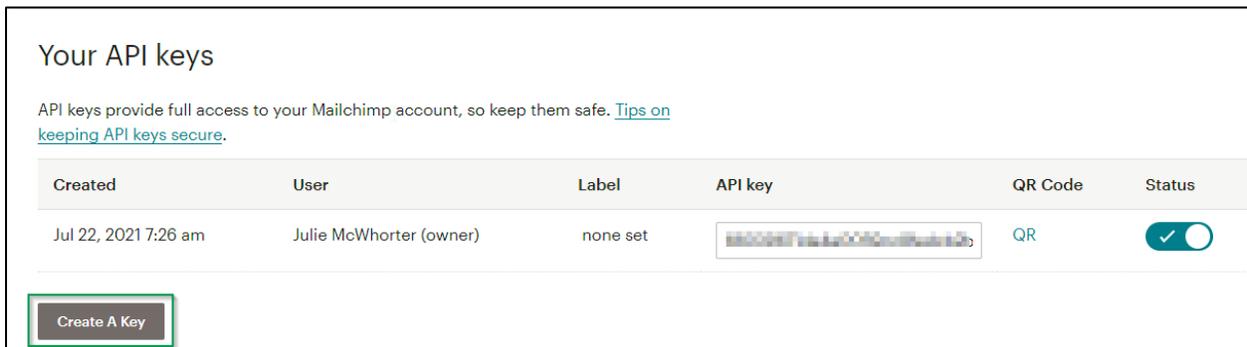
The image shows the Mailchimp login page. At the top left is the Mailchimp logo. Below it is the heading "Log In". Underneath the heading is a link: "Need a Mailchimp account? [Create an account](#)". There are two input fields: "Username" and "Password". The "Password" field has a "Show" button with an eye icon. Below the input fields is a reCAPTCHA widget with the text "I'm not a robot" and a "Log In" button. At the bottom, there is a "Keep me logged in" checkbox.

- Go to Account → Extras → Click on **API keys**.

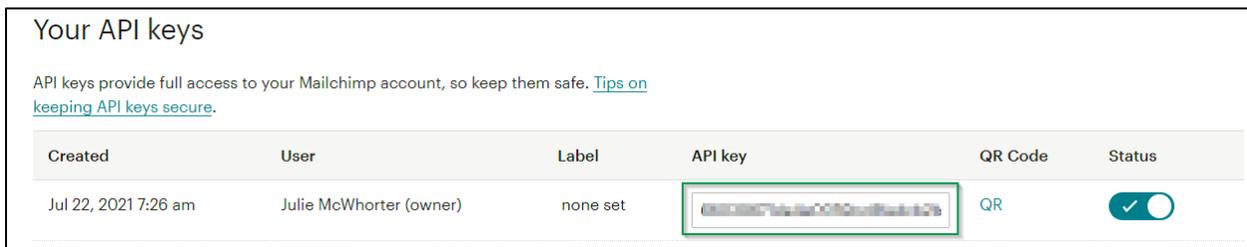




- Navigate to **'Your API keys'** section. If you already have an API key listed and you would like to use it, simply copy it for connecting to your Mailchimp account otherwise, click on **'Create A Key'** button.



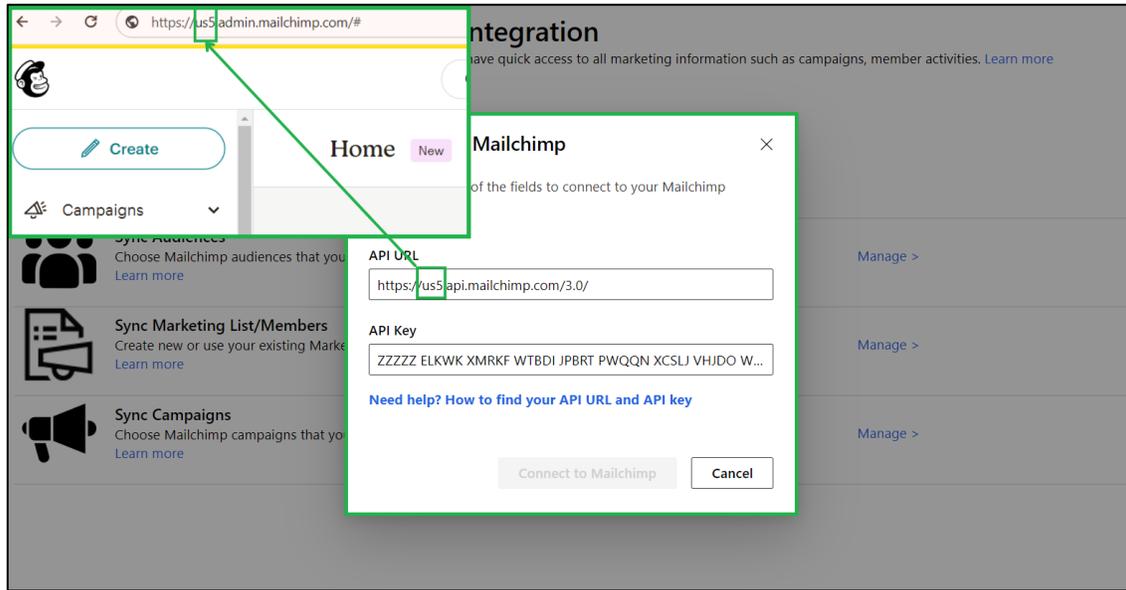
- The key will be created shortly. This will be the API key.



**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 **<https://us5.admin.mailchimp.com/>**. 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 **<https://us5.api.mailchimp.com/3.0/>**

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- 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.

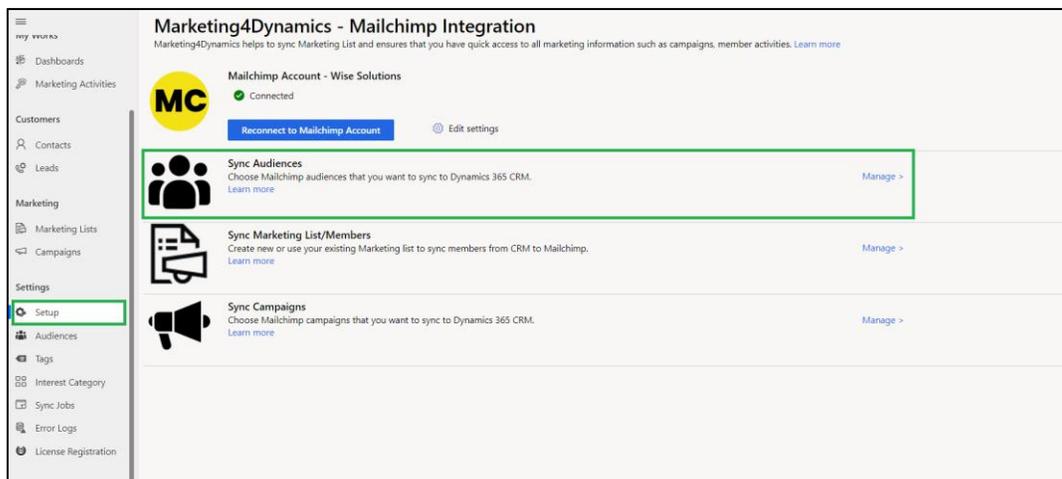
This section will enable you to choose which Mailchimp Audiences you want to sync to CRM from the list of Mailchimp audiences as there could be more than one Audiences in Mailchimp. You can sync one or more Mailchimp Audience.

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.

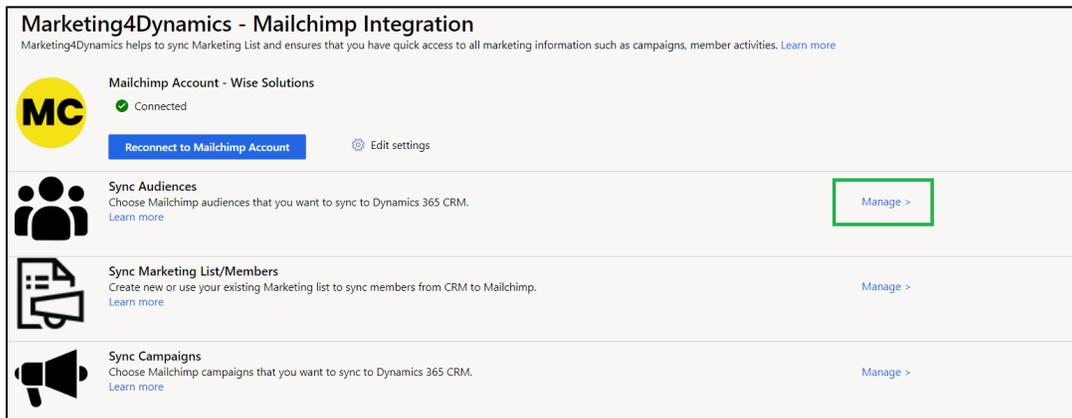
Upon Audience sync, the synchronization starts in the background and syncs Mailchimp Tags and creates the Mailchimp Members as Contact/Lead based on the associated Marketing List in the CRM.

To sync audiences, follow the steps given below:

- Go to Settings → Setup → Sync Audiences.



- Click on 'Manage'.



## 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 sync to CRM. You need to map CRM Marketing List with Mailchimp Audience. Members will be added to selected Marketing List.

Audience Name ↑	Sync Settings	Segment Name	Tags	Marketing List (Lead)	Marketing List(Contact)	Last Sync Time	Audience Status
Wise Solutions Subscribers	Full Sync	--	--	--	--		<a href="#">Sync Now</a>
Wise Solutions Subscribers	Full Sync	Vip Members	--	--	--		<a href="#">Sync Now</a>
Wise Solutions Subscribers	Sync Only	Marketing4Dyna...	--	--	--		<a href="#">Sync Now</a>
Wise Solutions Subscribers	--	Click2Export	--	--	--		<a href="#">Sync Now</a>

**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.**

## Marketing4Dynamics – User Manual

**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 ↑	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

- 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'.

Marketing4Dynamics: Mailchimp Integ... Try the new look

**Marketing4Dynamics - Mailchimp Integration**

**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 ↑	Sync Settings	Segment Name	Tags	Marketing List (Lead)	Marketing List(Contact)	Last Sync Time
Wise Solutions Subscribers	Full Sync	--	--	--	--	--
Wise Solutions Subscribers	--	Vip Members	--	--	--	--
Wise Solutions Subscribers	--	Marketing4Dyna...	--	--	--	--
Wise Solutions Subscribers	--	Click2Export	--	--	--	--

**Lookup Records**

Select record

Look for Marketing List

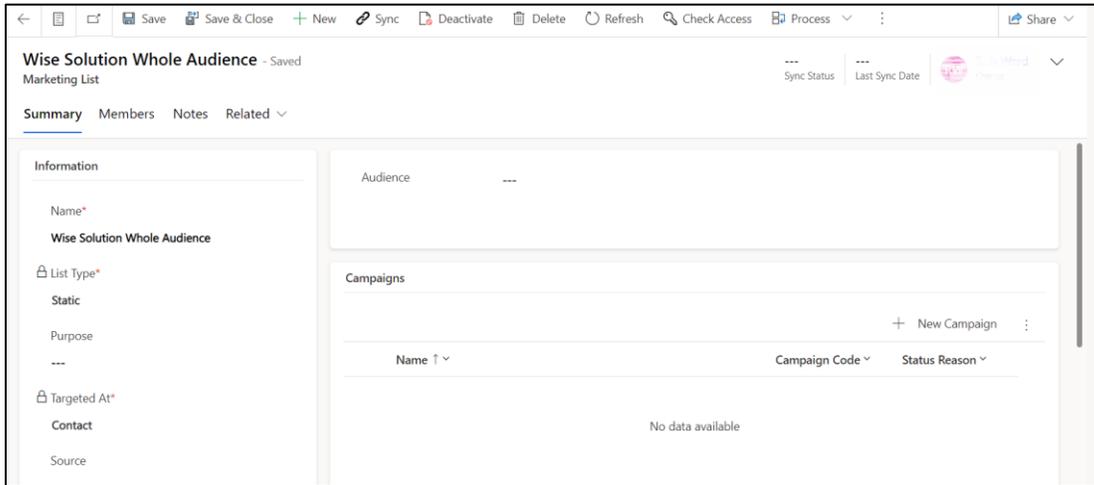
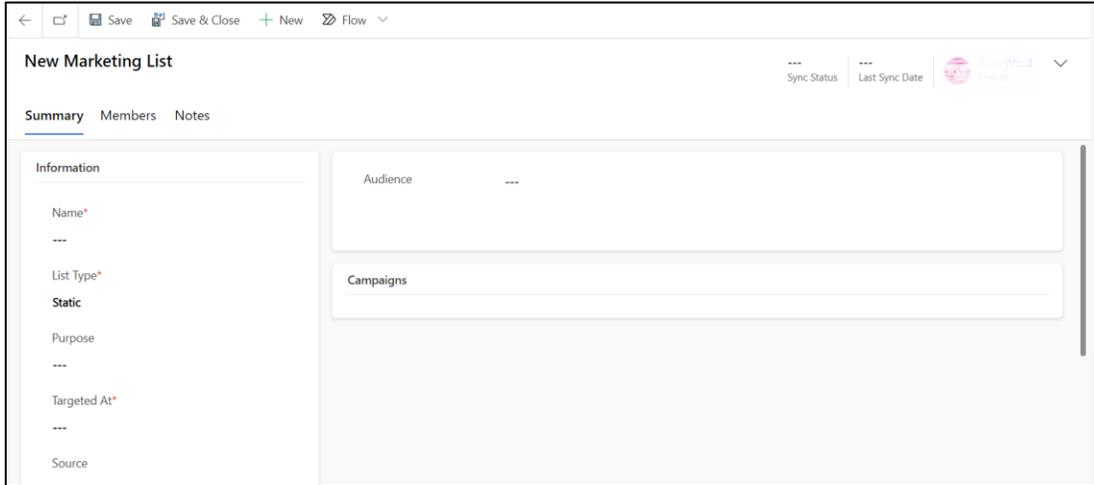
No records found. Create a new record.

+ New Marketing List Advanced lookup

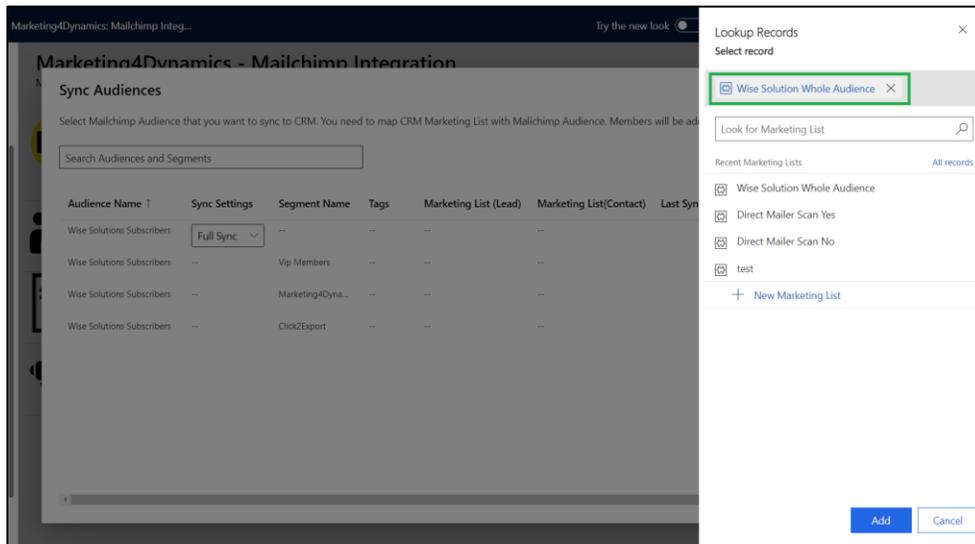
Add Cancel

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

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



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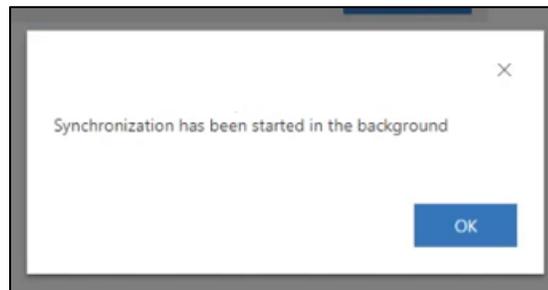
- Click on **'Sync Now'**.

### 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.

Audience Name ↑	Sync Settings	Segment Name	Tags	Marketing List (Lead)	Marketing List(Contact)	Last Sync Time	Audience Status
Wise Solutions Subscribers	Full Sync	--	--	--	on Whole Audience		Sync Now
Wise Solutions Subscribers	--	Vip Members	--	--	--		Sync Now

- A pop-up will appear stating that the sync process has started → 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 Mailchimp Audience. Members will be added to selected Marketing List.

Audience Name ↑	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

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

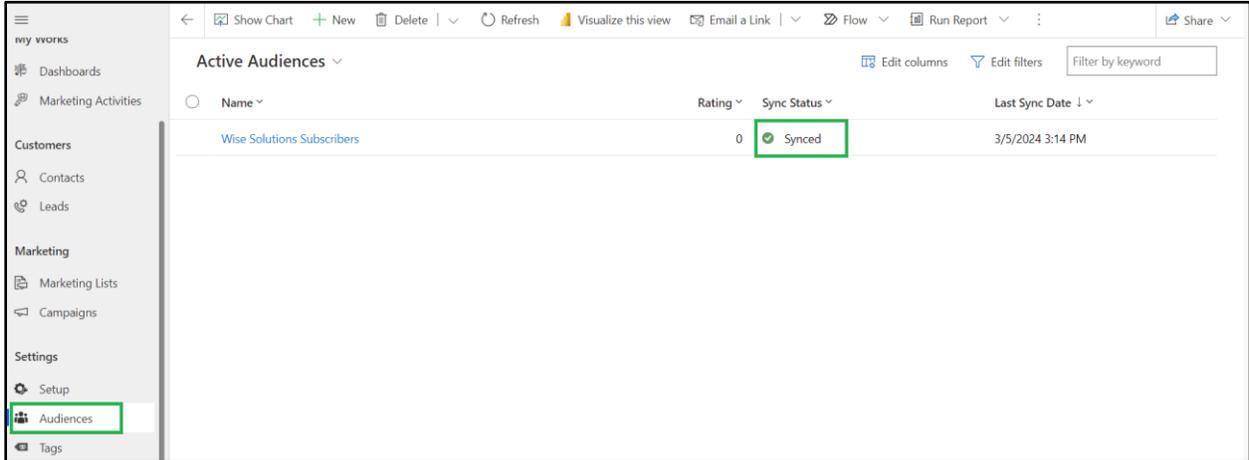
### Sync Audiences

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.

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 Audie...	3/5/2024 3:14 PM	Synced

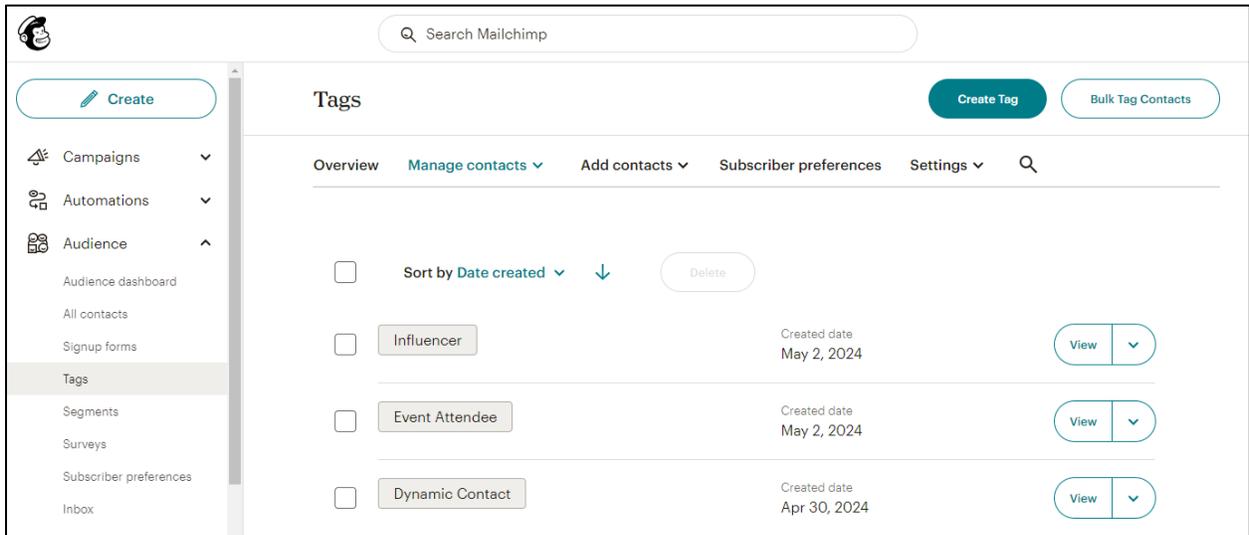
- Also, you can verify the Sync Status by navigating to **Settings -> Audiences**.

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- 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:



**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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**Wise Solutions Subscribers** - Saved Audience

Synced Sync Status 3/5/2024 3:57 PM Last Sync Date

General Marketing Details Related

Name: Wise Solutions Subscribers

Rating: ☆☆☆☆☆

Name	Sync Status	Last Sync Date
Customer	Synced	3/5/2024 3:56 PM
Influencer	Synced	3/5/2024 3:56 PM
Member	Synced	3/5/2024 3:56 PM
Gamifics 365	Synced	3/5/2024 3:56 PM

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**Active Tags**

Name	Audience	Sync Status	Last Sync Date
Customer	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM
Influencer	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM
Member	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM
Gamifics 365	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM
SharePoint Security Sync Features	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM
Prospect	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM
Client	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM
Event Attendee	Wise Solutions Subscribers	Synced	3/5/2024 3:56 PM

- Mailchimp Members will get created as Contacts/Leads and associated with 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 Sync Status 3/5/2024 3:57 PM Last Sync Date

Summary Members Notes Related

Information

Name: Wise Solution Whole Audience

List Type: Static

Purpose: ---

Audience: **Wise Solutions Subscribers** Tag: ---

Campaigns

+ New Campaign

Name Campaign Code Status Reason

# Marketing4Dynamics – User Manual

The screenshot shows the 'Wise Solution Whole Audience' page in Marketing4Dynamics. At the top, it indicates 'Synced' status and a last sync date of '3/5/2024 3:57 PM'. Below this, there are tabs for 'Summary', 'Members', 'Notes', and 'Related'. The 'Members' tab is active, displaying a table of members. The table has columns for 'Full Name', 'Email', 'Company Name', and 'Sync Status'. All listed members are marked as 'Synced'.

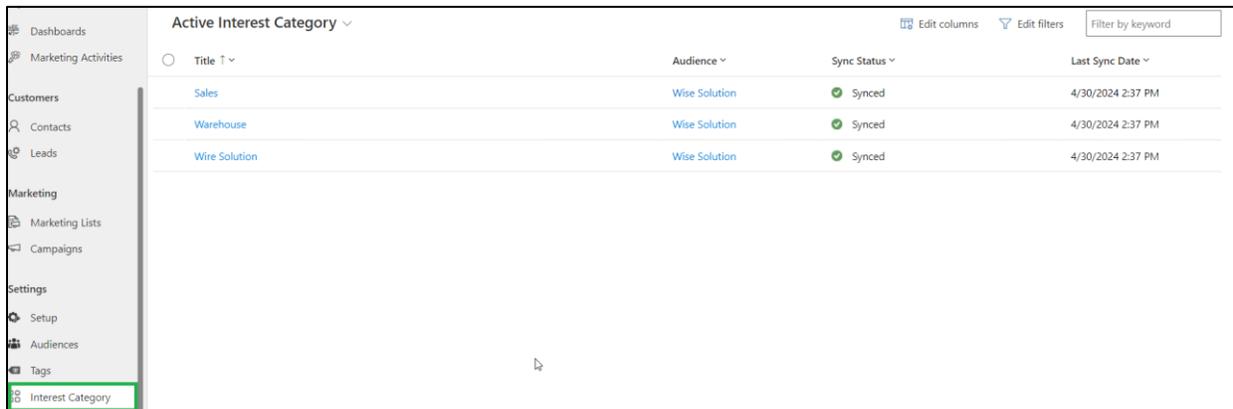
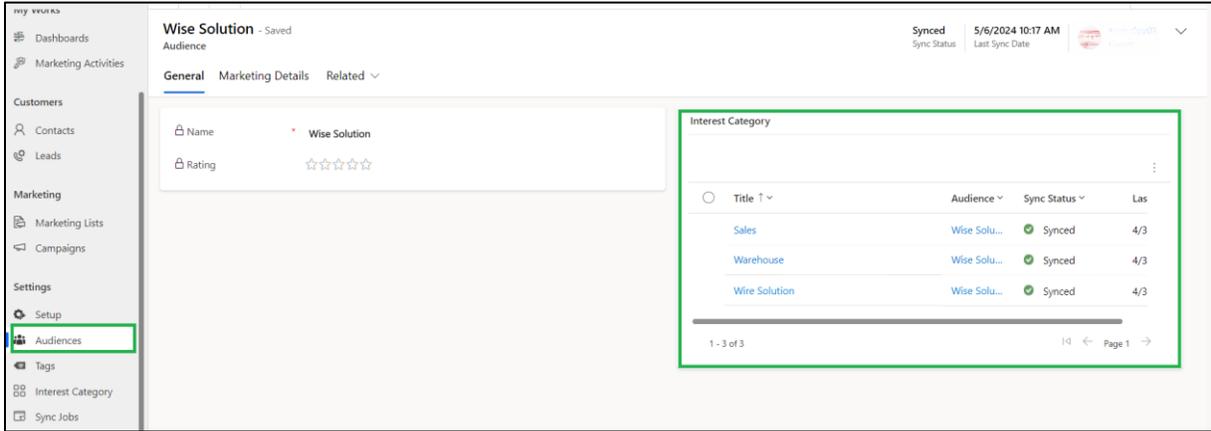
Full Name	Email	Company Name	Sync Status
Aaren Copner	aoconannon1b@wikispac	---	Synced
Aarika Firbanks	aaainsworthno@live.com	---	Synced
Ab Berks	abersrp@google.com	---	Synced
Ab Gostall	agostall7z@ftc.gov	---	Synced
Abbey test Kent	abbeykent@gmail.com	---	Synced
Abi	Abi@gmail.com	---	Synced

## Mailchimp Interest / Group:

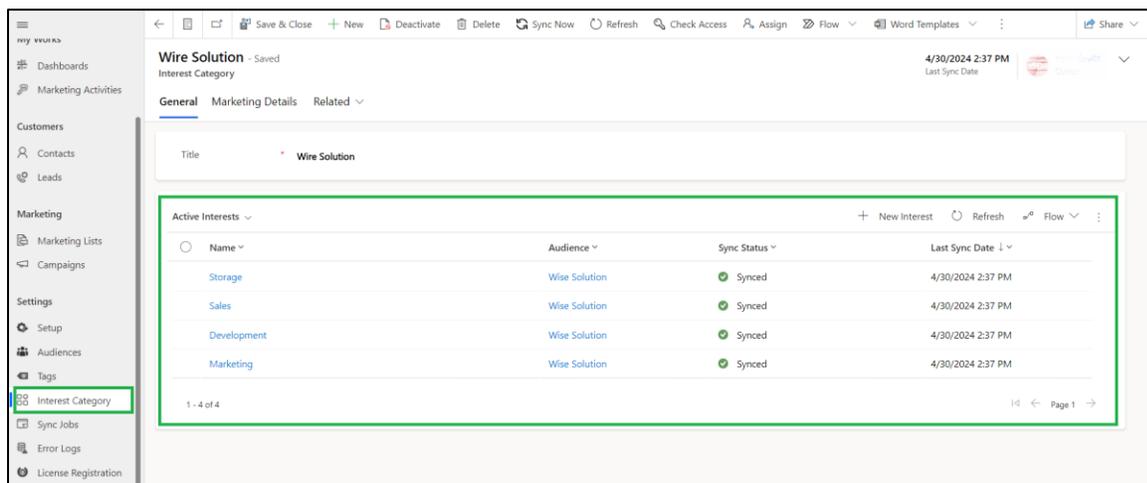
The screenshot shows the Mailchimp 'Groups' page. The left sidebar contains navigation options like 'Campaigns', 'Automations', and 'Audience'. The main content area shows a list of groups under the heading 'Groups'. The groups listed are 'Marketing' (2 contacts), 'Development' (1 contact), and 'Sales' (1 contact). Each group has options to 'Delete', 'Import', and 'Send'. There are also buttons for 'Create Groups', 'Hide Groups', 'Add Group', and 'View Groups'.

- **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**.

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- Mailchimp Members will get created as Contacts/Leads and associated with 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**.

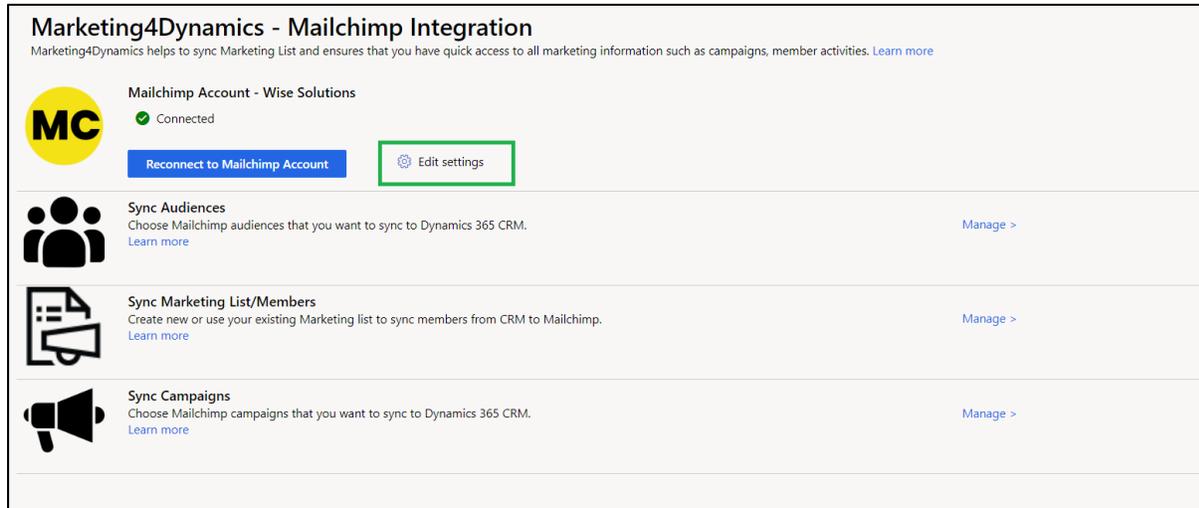


## Configure Global Setting

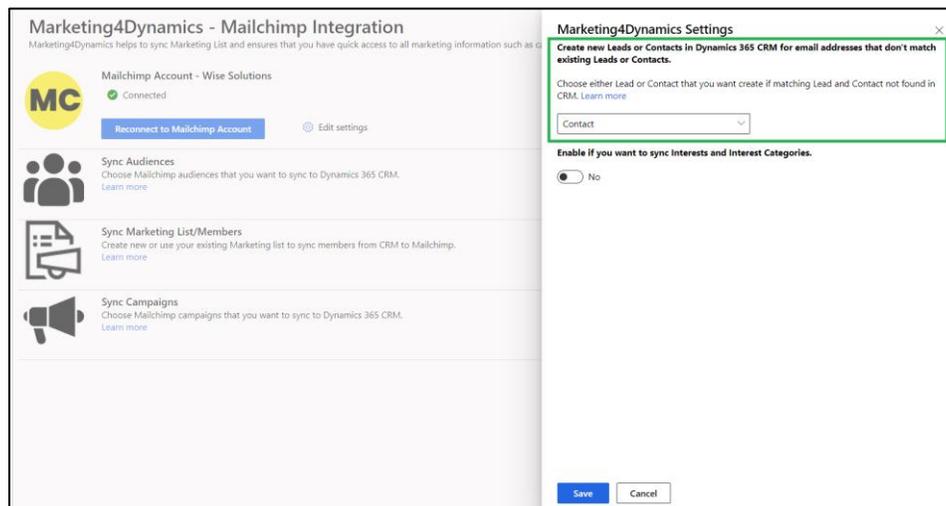
To establish the default list type for new email addresses in your CRM, use the Global Settings feature. This choice becomes the default for any email address not already in your CRM, ensuring efficient email address management.

To configure, follow these steps:

- Click on '**Edit Settings**'.



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



## Interest/ Group Sync Activation

## Marketing4Dynamics – User Manual

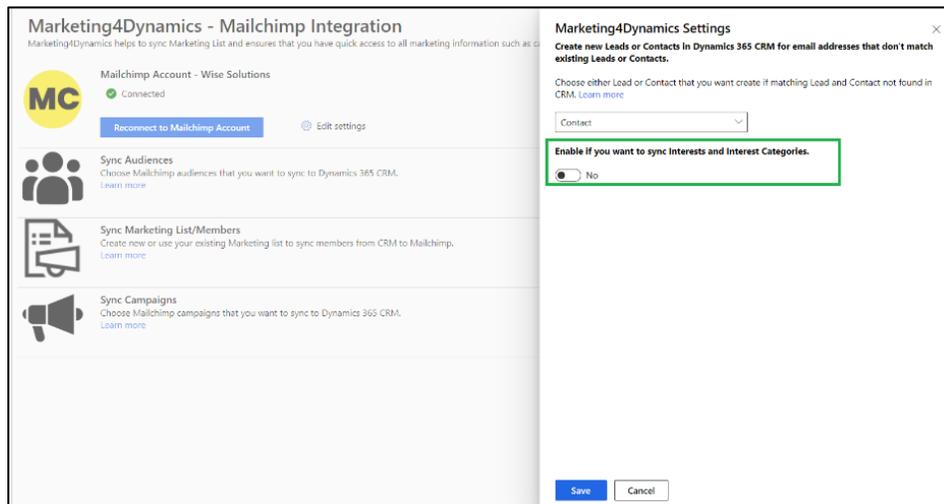
Toggle on this switch to sync **Interests/Groups** and **Interest/Group Categories** between Mailchimp and CRM.

- **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 sub-categories, 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.'**

- 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 → Setup → Sync Marketing List/Members → 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](#)

**Mailchimp Account - Wise Solutions**  
Connected  
[Reconnect to Mailchimp Account](#) [Edit settings](#)

**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 >](#)

**Sync Campaigns**  
Choose Mailchimp campaigns that you want to sync to Dynamics 365 CRM. [Learn more](#) [Manage >](#)

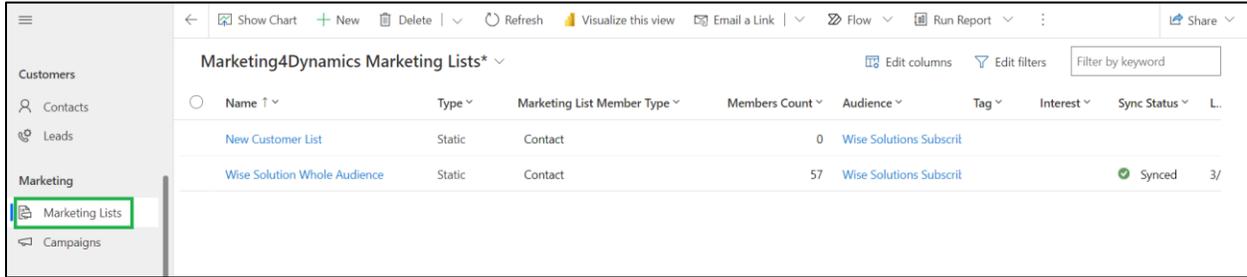
- This will be redirected to the Marketing List home grid.

**Marketing4Dynamics Marketing Lists**

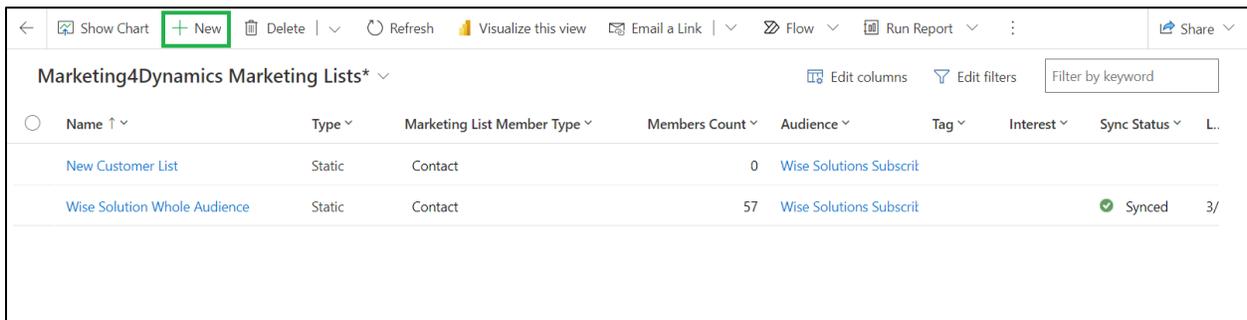
Name	Type	Marketing List Member Type	Members Count	Audience	Tag	Sync Status	Last Synced
New Customers List	Static	Contact	0	Wise Solutions Subscri	Conference Lead	---	---
Wise Solutions Whole Audience	Static	Contact	16	Wise Solutions Subscri	---	Synced	04

- Or, directly go to Marketing4Dynamics App → Marketing → Marketing Lists.

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



- This will open up a Marketing4Dynamics Marketing List form.

**New Marketing List**

Summary Members Notes

**Information**

Name\* ---

List Type\* **Static**

Purpose ---

Targeted At\* ---

Source ---

Currency ---

**Audience** ---

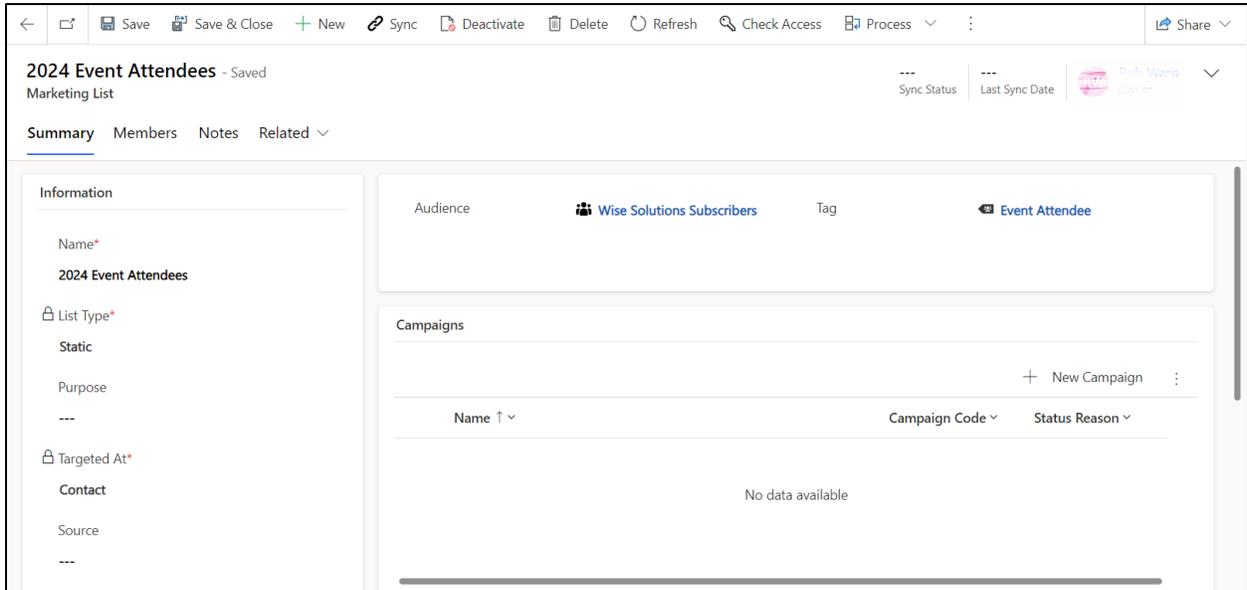
**Campaigns**

### For Tags

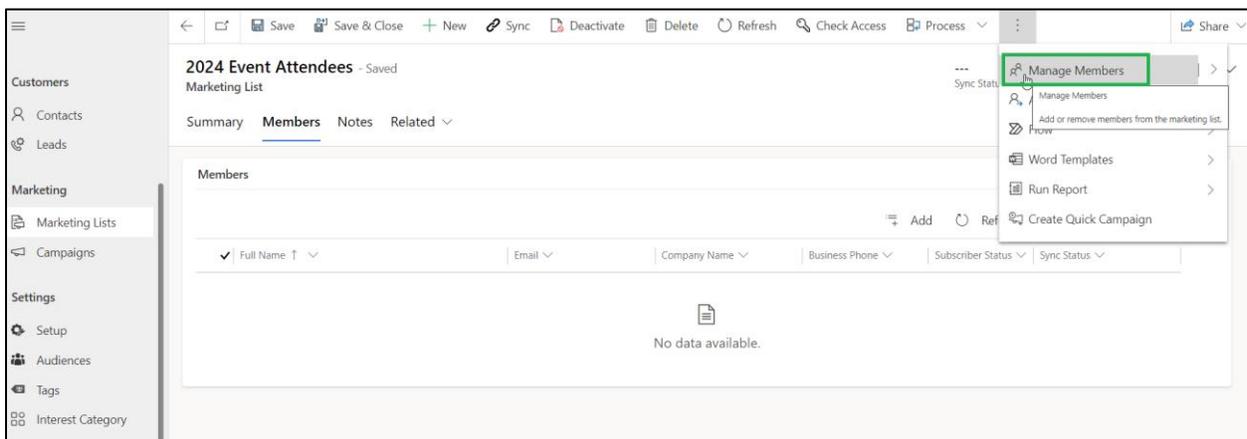
- In the new Marketing List, enter the following information,
  - **Name:** The name of Marketing List
  - **List Type:** Select either **Static** or **Dynamic**. You can sync both types of Marketing List.

## Marketing4Dynamics – User Manual

- **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.

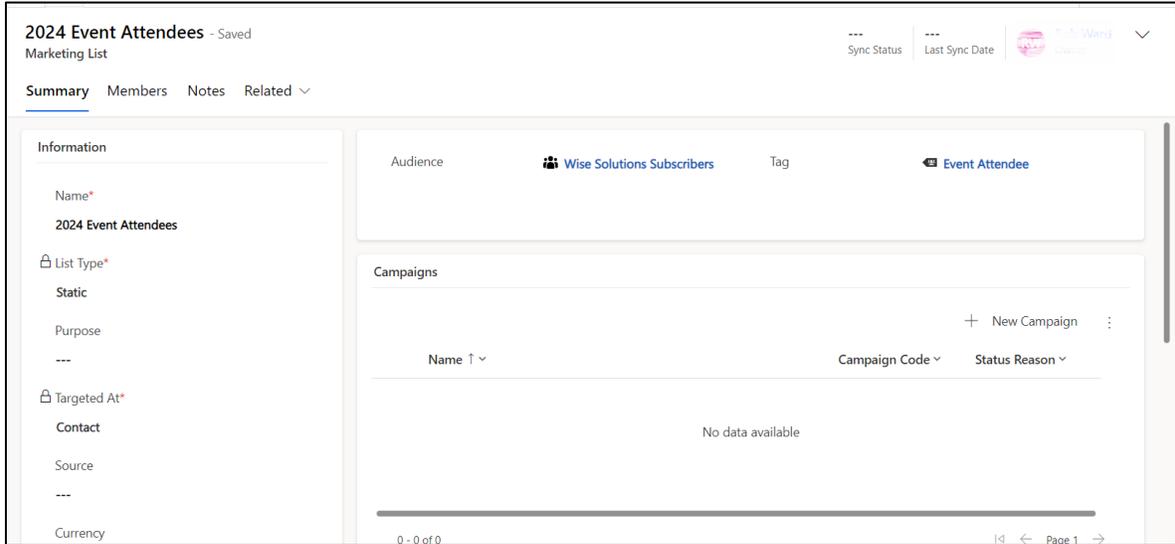


- In Members tab, now you can add members either static or dynamic. Use **'Manage Members'** button to members to the Marketing list.

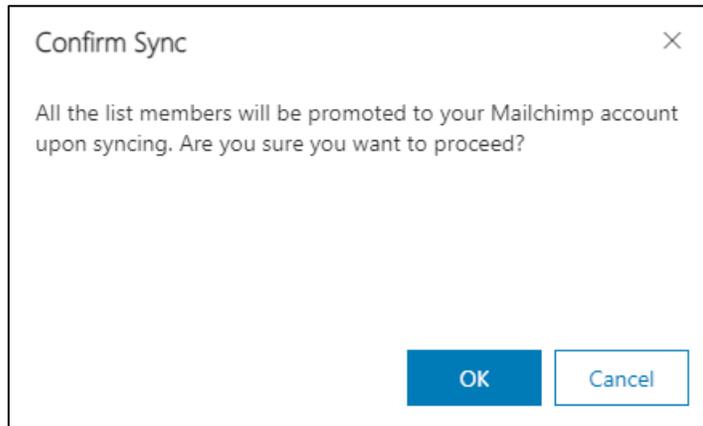


- As soon as you save the Marketing List, you will see a **'Sync'** button. Only System Administrator or Marketing4Dynamics Administrator can sync the Marketing List.

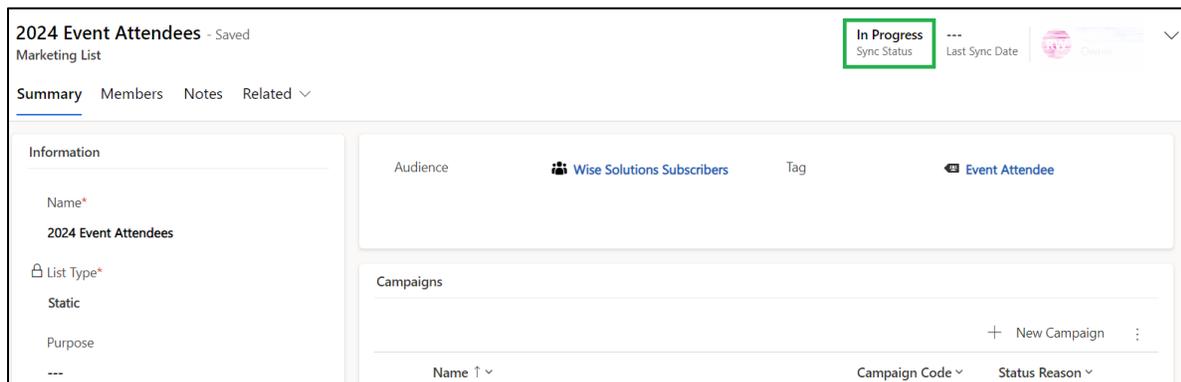
# Marketing4Dynamics – User Manual



- 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.

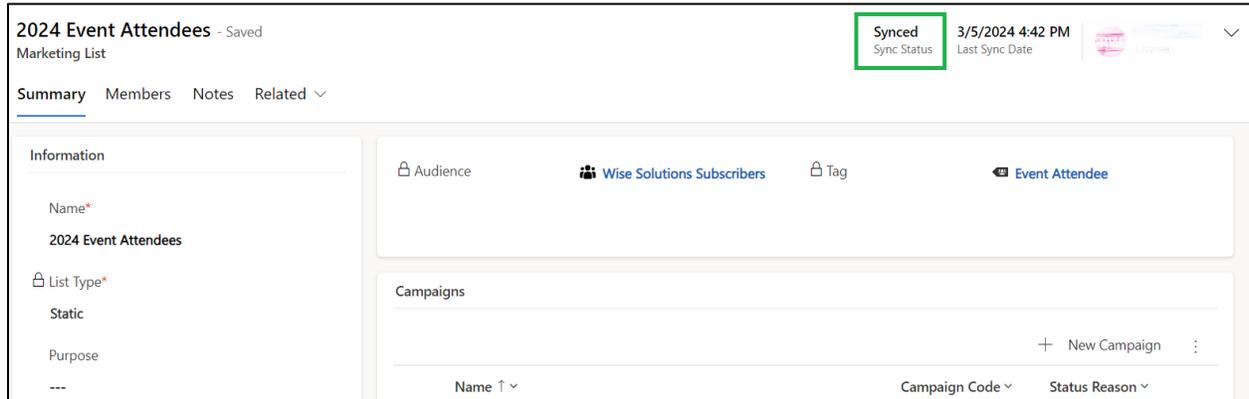


- The **Sync Status** will change to 'In Progress'.



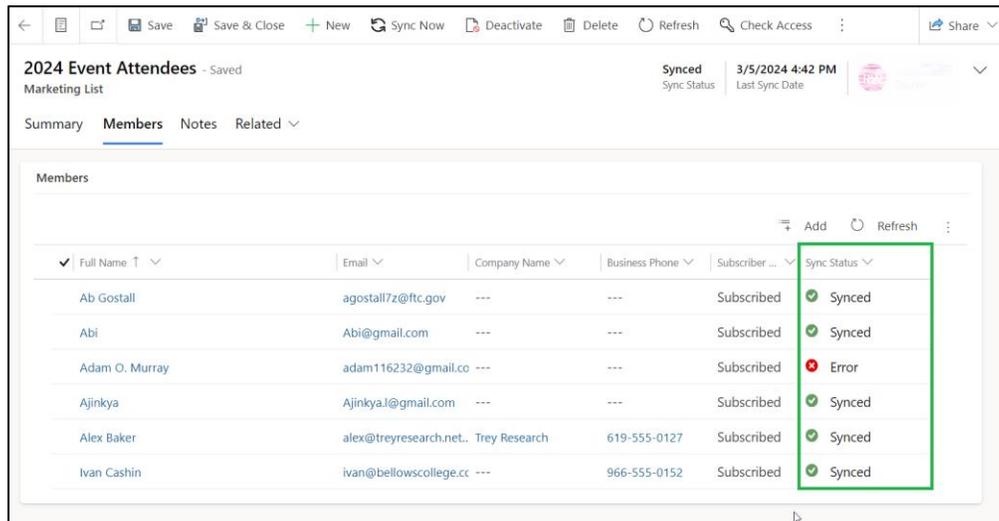
## Marketing4Dynamics – User Manual

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



The screenshot shows the '2024 Event Attendees' marketing list. At the top right, the sync status is 'Synced' (highlighted with a green box) and the last sync date is '3/5/2024 4:42 PM'. Below this, there are tabs for 'Summary', 'Members', 'Notes', and 'Related'. The 'Information' section on the left shows the list name and type. The main area displays 'Audience' as 'Wise Solutions Subscribers' and 'Tag' as 'Event Attendee'. There is also a 'Campaigns' section with a '+ New Campaign' button.

- Also you can check Sync Status of individual member.

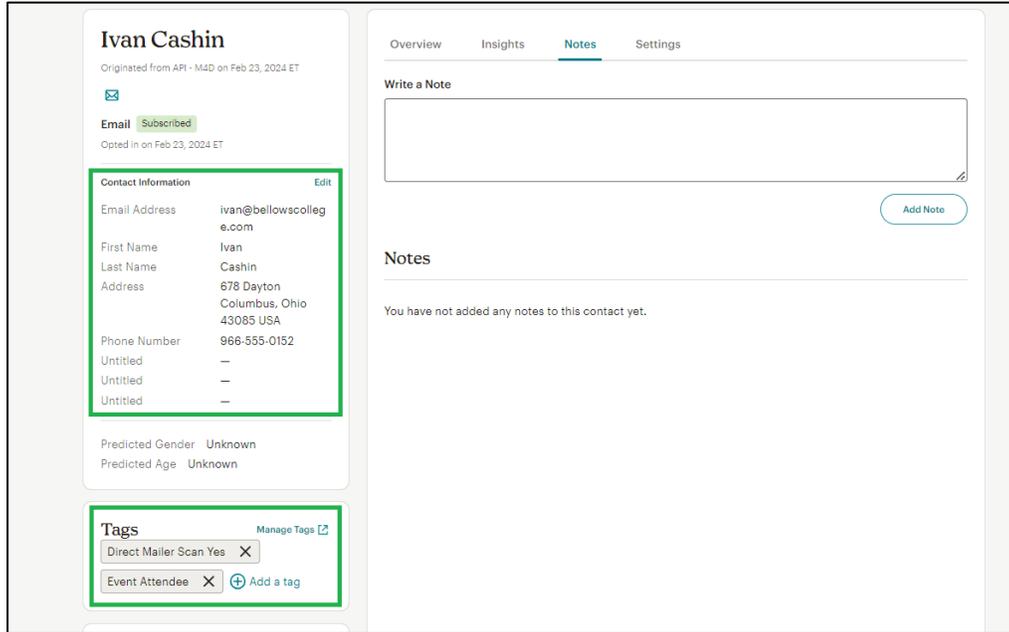


The screenshot shows the 'Members' tab of the '2024 Event Attendees' marketing list. A table lists individual members with their sync status. The 'Sync Status' column is highlighted with a green box. The table includes columns for Full Name, Email, Company Name, Business Phone, Subscriber Status, and Sync Status.

Full Name	Email	Company Name	Business Phone	Subscriber Status	Sync Status
Ab Gostall	agostall7z@ftc.gov	---	---	Subscribed	Synced
Abi	Abi@gmail.com	---	---	Subscribed	Synced
Adam O. Murray	adam116232@gmail.co	---	---	Subscribed	Error
Ajinkya	Ajinkya.I@gmail.com	---	---	Subscribed	Synced
Alex Baker	alex@tresearch.net	Trey Research	619-555-0127	Subscribed	Synced
Ivan Cashin	ivan@bellowscollege.cc	---	966-555-0152	Subscribed	Synced

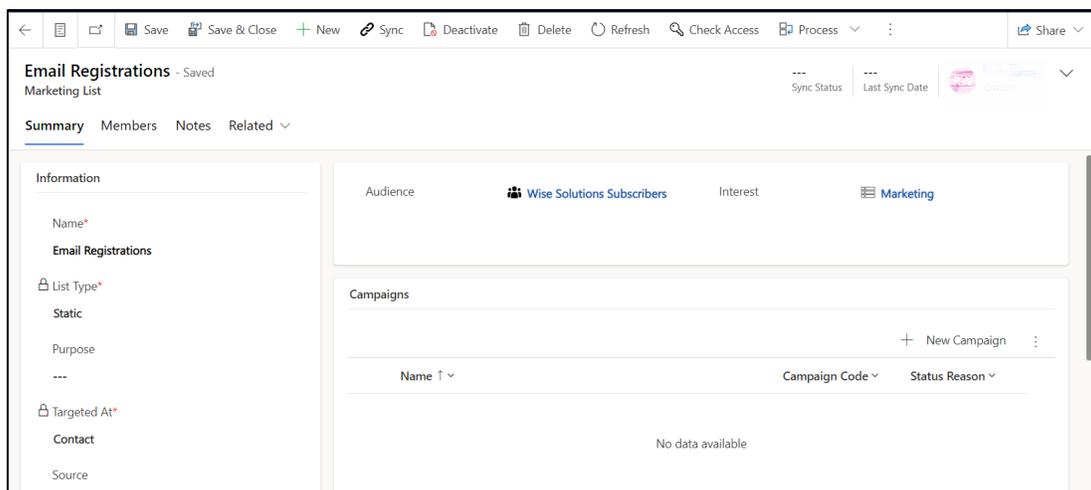
- During the process, it checks for any existing members in the selected Mailchimp Audience. And if there are members then it updates the members (profile information) or else it will create new members and attach the selected Tags to them.

# Marketing4Dynamics – User Manual



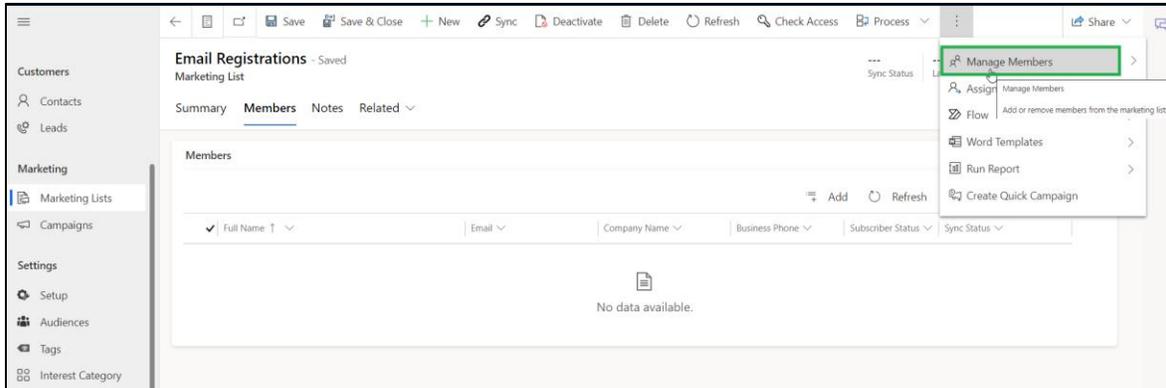
## For Interest

- 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.

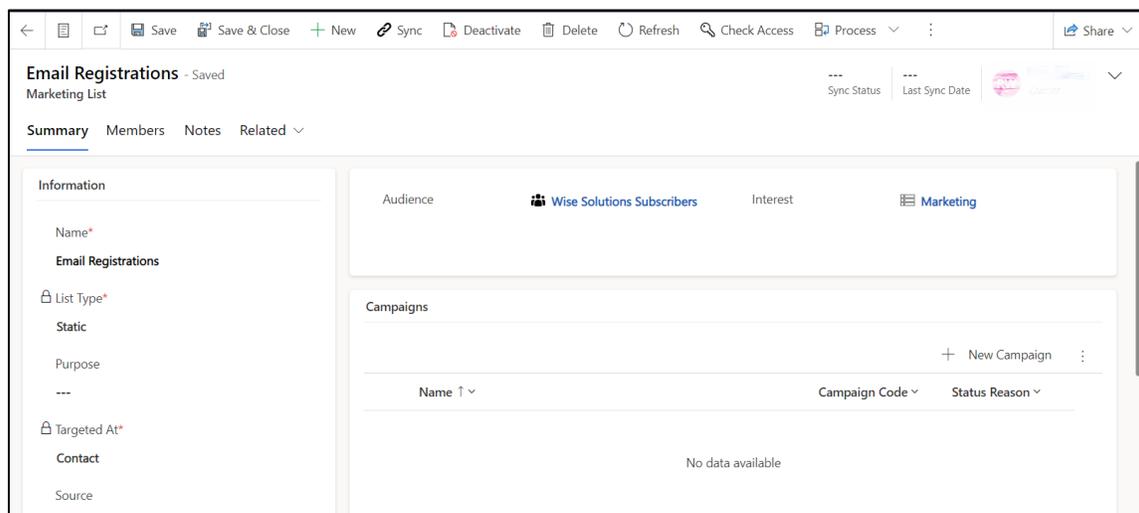


## Marketing4Dynamics – User Manual

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

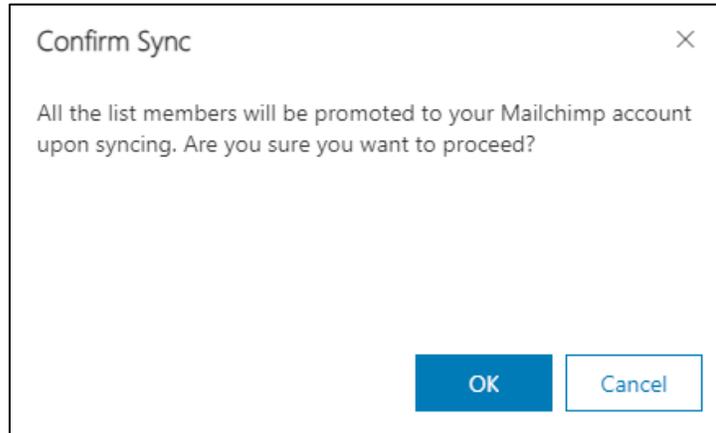


- As soon as you save the Marketing List, you will see a **'Sync'** button. Only System Administrator or Marketing4Dynamics Administrator can sync the Marketing List.

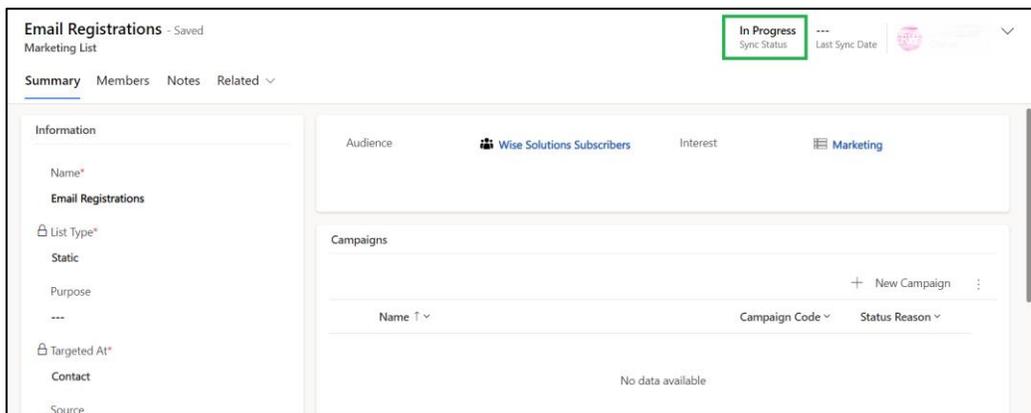


- Once the **'Sync'** button is clicked, a dialog box will appear asking confirmation. After getting confirmation, the synchronization process will get started in the background.

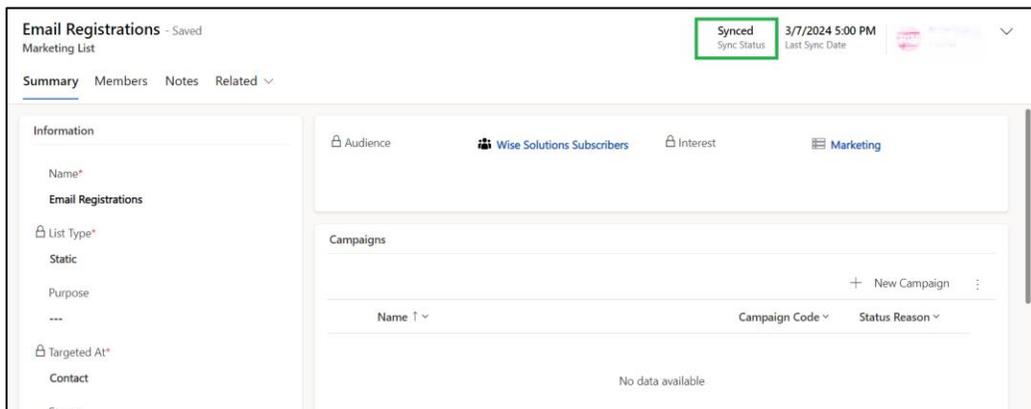
## Marketing4Dynamics – User Manual



- The **Sync Status** will change to **'In Progress'**.



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



- Also you can check Sync Status of individual member.

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**Email Registrations** - Saved  
Marketing List

Synced 3/7/2024 5:00 PM  
Sync Status Last Sync Date

Summary **Members** Notes Related

Members

Add Refresh Quick Campaign

Full Name	Email	Company Name	Business Phone	Subscriber Status	Sync Status
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@tresearch.net	Trey Research	567-555-0157	Subscribed	Synced
Lilly Pyles	lilly@adatum.com	---	557-555-0166	Subscribed	Synced
Miguel Garcia	miguel@northwindtraders.com	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.

**Gabriela Christiansen**  
Originated from API - M4D on Feb 23, 2024 ET

Email **Subscribed**  
Cited in on Feb 23, 2024 ET

**Contact Information** Edit

Email Address gabriela@adatum.com

First Name Gabriela

Last Name Christiansen

Address 2345 Birchwood Dr  
Redmond,  
Washington 98101  
USA

Phone Number 930-555-0168

Untitled —

Untitled —

Untitled —

Predicted Gender Unknown

Predicted Age Unknown

**Tags** Manage Tags

You have not assigned any tags to this contact yet

Add a tag

**Groups** Edit Groups

Wire Solution Marketing

Sales —

Warehouse —

Overview Insights **Notes** Settings

Write a Note

Add Note

Notes

You have not added any notes to this contact yet.

## Sync Campaigns

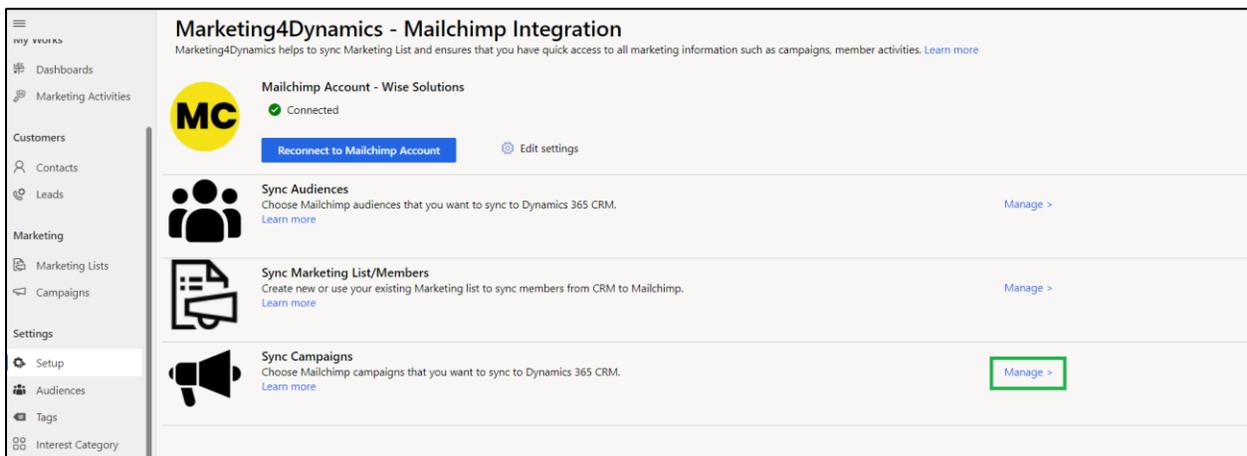
In previous sections, we synced Mailchimp Audiences, Tags, and Members to Dynamics 365 CRM and then we synced the CRM Marketing List (Contacts or Leads) to Mailchimp.

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.

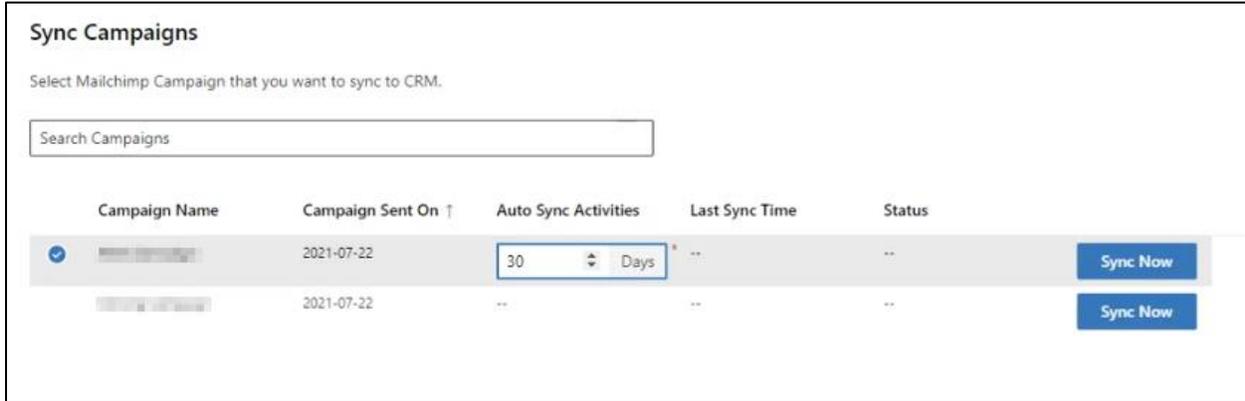
In this section, we will sync Mailchimp campaigns and member's activities in CRM. This will help CRM users get marketing stats directly in CRM and will further help to decide on future sales strategies.

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:

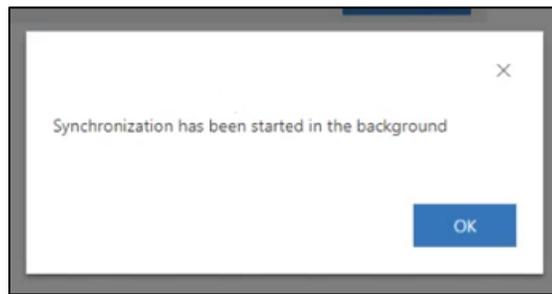
- Go to Settings → Setup → Sync Campaigns → Click on **'Manage'**.



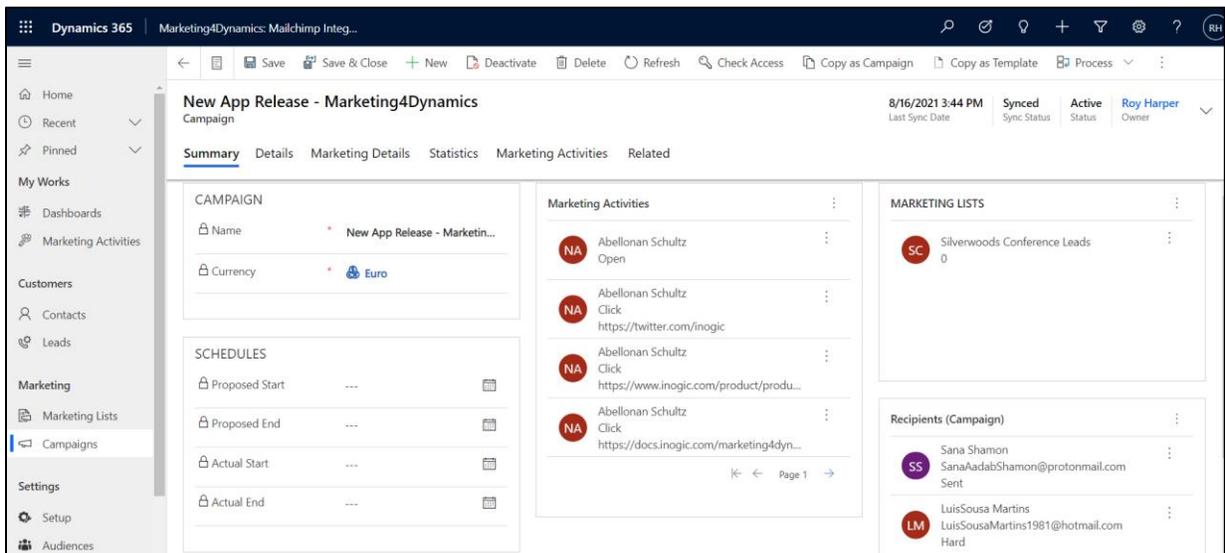
- Select the campaign → Enter the number of days in **'Auto Sync Activities'** → Click on **'Sync Now'**.
- In the **'Campaign Sent On'** section, the latest campaign will be listed on top followed by the previous campaign and so on. The **'Auto Sync Activities'** section is to determine the period for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



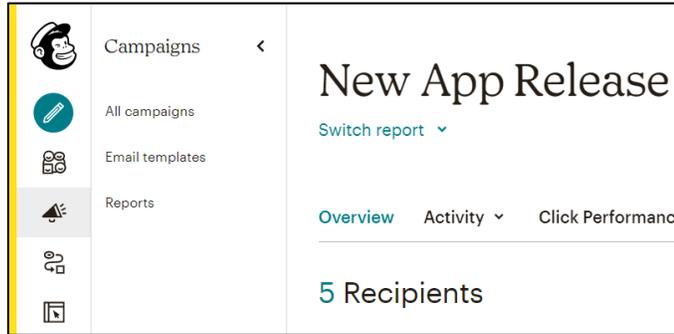
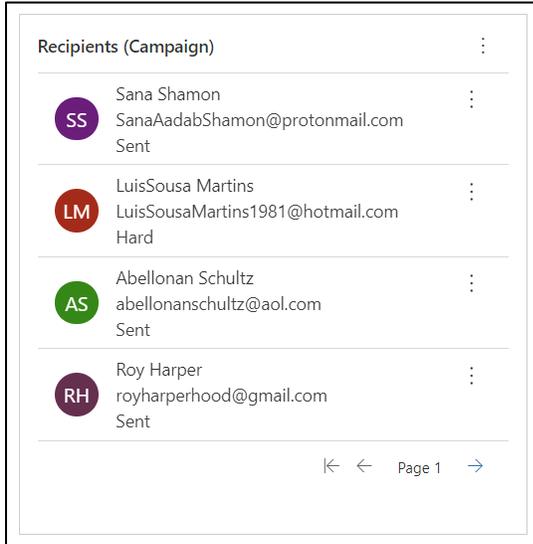
- A pop-up will appear stating that the sync process has started → Click on Ok.



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



- 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.



- **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.

# Marketing4Dynamics – User Manual

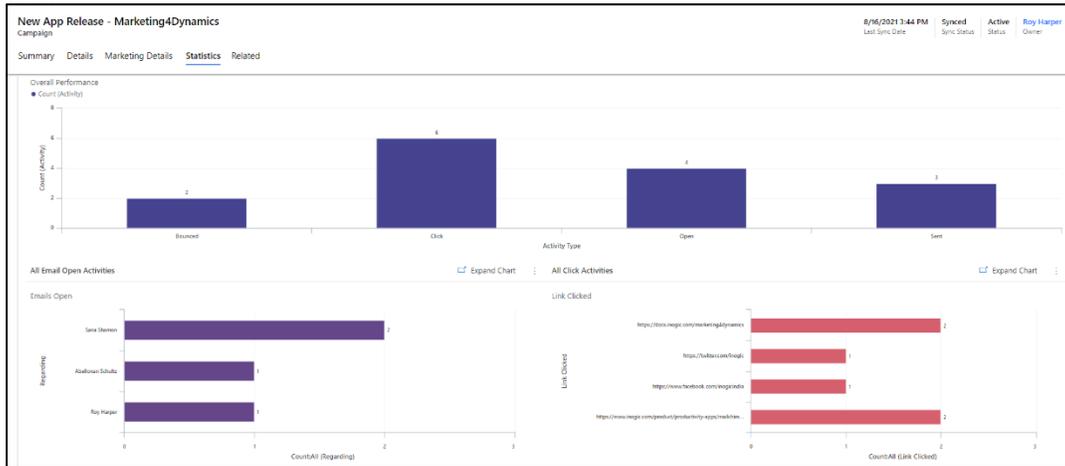
**New App Release - Marketing4Dynamics**  
Campaign

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

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



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

**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 Chs
abellonanschultz@aol.com	1	Abellon	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 0
SanaAadabShamon@protonmail.com	2	Sana	Shamon	1628 Farnum Road New York, NY 10003 USA	212-375-7398		★★★★★	8/13/21 4

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

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The screenshot displays the Dynamics 365 CRM interface for a contact named Sana Shamon. The contact information is shown on the left, and a timeline of activities is on the right. The timeline is highlighted with a green border. The activities listed are:

- New Version Released - Click2Export (Click) - Date Created: 8/13/2021 4:29 PM
- New Version Released - Click2Export (Click) - Date Created: 8/13/2021 4:29 PM
- New Version Released - Click2Export (Click) - Date Created: 8/13/2021 4:29 PM
- New Version Released - Click2Export (Open) - Date Created: 8/13/2021 4:29 PM
- Auto-post on Sana Shamon - Date Created: 8/13/2021 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.

The screenshot shows the 'Sync Campaigns' section in Dynamics 365 CRM. It displays a table of campaigns with columns for Campaign Name, Campaign Sent On, Auto Sync Activities, Last Sync Time, and Status. The 'Last Sync Time' column is highlighted with a green border. The table contains two rows of data:

Campaign Name	Campaign Sent On ↑	Auto Sync Activities	Last Sync Time	Status	
New Version Released - Click...	8/13/2021	30 days from campaign sent	8/17/2021 3:44 PM	Synced	Sync Now
New App Release - Marketing...	8/13/2021	30 days from campaign sent	8/17/2021 3:44 PM	Synced	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** → **Settings** → **Sync Jobs**.

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The screenshot shows the Dynamics 365 interface for 'Marketing4Dynamics: Mailchimp Integ...'. The left-hand navigation pane includes sections for Customers (Contacts, Leads), Marketing (Marketing Lists, Campaigns), and Settings (Setup, Audiences, Tags, Sync Jobs, Error Logs, License Registration). The 'Sync Jobs' option is highlighted with a green box. The main content area displays a table titled 'Successful Sync Jobs' with columns for Name, Sync Status, and Source. The table contains 10 rows, all showing 'Success' status and 'Marketing' source.

Name	Sync Status	Source
Sync job for contact	Success	Marketing
Sync job for contact	Success	Marketing
Sync job for contact	Success	Marketing
Sync job for contact	Success	Marketing
Sync job for ikl_recipient	Success	Marketing
Sync job for ikl_marketingactivity	Success	Marketing
Sync job for ikl_recipient	Success	Marketing
Sync job for ikl_marketingactivity	Success	Marketing
Sync job for ikl_recipient	Success	Marketing
Sync job for ikl_marketingactivity	Success	Marketing

The screenshot shows the 'Marketing Details' section for a contact named 'Abia Tuma'. It includes a 'Sync Details' section with fields for Id, Audience, Sync Status (Synced), and Last Sync Date (8/6/2021 10:20 PM). Below this is a 'Successful Sync Jobs' table with columns for Name, Sync Status, Source, Submitted At, Submitted By, Processed At, and Created On. The table contains one row showing a successful sync job for 'contact' on 8/6/2021 at 10:20 PM.

Name	Sync Status	Source	Submitted At	Submitted By	Processed At	Created On
Sync job for contact	Success	Marketing	8/6/2021 10:20 PM	Roy Humpal	8/6/2021 10:20 PM	8/6/2021 10:20 PM

The screenshot shows a 'Sync job for contact' interface. At the top, it says 'Sync Jobs' and 'Roy Harper Owner'. Below that, there are tabs for 'General' and 'Related'. The main content area is divided into several sections:

- Name:** Sync job for contact
- Entity Type:** A table with columns for Entity Type, Name, and Marketing Activity.
 

Contact	Abia Tuma	Lead	---	Marketing Activity	---
List	Wise Solutions Subscribers	Campaign	---	Recipient	---
Tag	---				
- Sync Job Details:** A table with columns for Sync Status, Submitted By, Processed At, Processed Count, Source, and Submitted At.
 

Sync Status	Success	Submitted By	Roy Harper	Source	Marketing
Submitted At	8/6/2021 10:20 PM	Submitted At	8/6/2021 10:20 PM		
Processed At	---	Processed Count	---		
- Error Description:** ---

- **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	
○ Wise Solutions Subscribers	Wise Solutions Subscribers	8/6/2021 10:20 PM	Synced	<a href="#">Sync Now</a>

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

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3) When Sync Now button is clicked on marketing list.



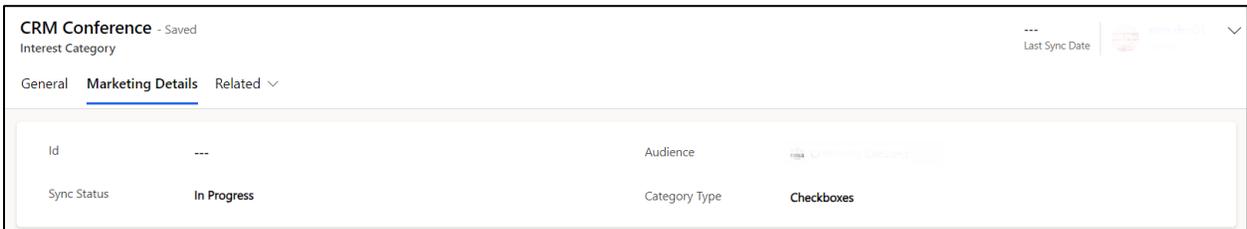
4) When Sync Now button is pressed while syncing a Campaign.

Campaign Name	Campaign Sent On ↑	Auto Sync Activities	Last Sync Time	Status	
Events Campaign	7/22/2021	30 days from campaign sent	8/9/2021 10:39 PM	Synced	<a href="#">Sync Now</a>
Content Campaign	7/22/2021	30 days from campaign sent	8/9/2021 10:39 PM	Synced	<a href="#">Sync Now</a>

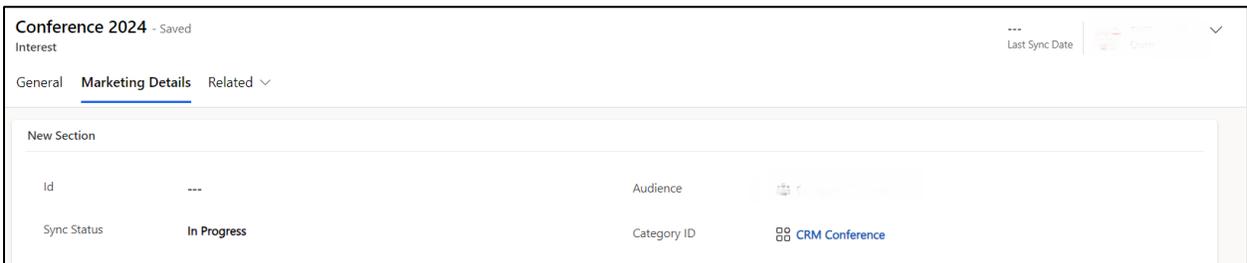
5) When a new tag is created in CRM.



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



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



- 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	<b>id</b> field of the member will be mapped in <b>Id</b> field of Contact in CRM
2	Email	email_address	<b>email_address</b> field of member will be mapped in <b>Email</b> field in CRM
3	Email Type	email_type	<b>email_type</b> field of member will be mapped in <b>Email Type</b> field in CRM
4	Subscriber Status	status	<b>status</b> field of member will be mapped in <b>Subscriber Status</b> field in CRM
5	Unsubscribe Reason	unsubscribe_reason	<b>unsubscribe_reason</b> field of member will be mapped in <b>Unsubscribe Reason</b> field in CRM
6	First Name	FNAME	<b>FNAME</b> of member will be mapped with <b>First Name</b> in CRM
7	Last Name	LNAME	<b>LNAME</b> of member will be mapped with <b>Last Name</b> in CRM

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

4	Subscriber Status	status	<b>status</b> field of member will be mapped in <b>Subscriber Status</b> field in CRM
5	Unsubscribe Reason	unsubscribe_reason	<b>unsubscribe_reason</b> field of member will be mapped in <b>Unsubscribe Reason</b> field in CRM
6	First Name	FNAME	<b>FNAME</b> of member will be mapped with <b>First Name</b> in CRM
7	Last Name	LNAME	<b>LNAME</b> of member will be mapped with <b>Last Name</b> in CRM
8	Opted In IP Address	ip_opt	<b>ip_opt</b> will be mapped with <b>Opted In IP Address</b> in CRM
9	Opted In Date	timestamp_opt	<b>timestamp_opt</b> will be mapped with <b>Opted In Date</b> in CRM
10	Member Rating	member_rating	<b>member_rating</b> will be mapped with <b>Member Rating</b> in CRM
11	Language	language	<b>language</b> of member will be mapped with <b>Language</b> in CRM
12	VIP	vip	<b>vip</b> of member will be mapped with <b>VIP</b> in CRM (Boolean)
13	Email Client	email_client	<b>email_client</b> of member will be mapped with <b>Email Client</b> in CRM
14	Source	source	<b>source</b> of member will be mapped with <b>Source</b> in CRM
15	Business Phone	phone	<b>phone</b> of member will be mapped with <b>Business Phone</b> in CRM & vice versa
16	Street 1	addr1	<b>addr1</b> of member will be mapped with <b>Street 1</b> in CRM
17	City	city	<b>city</b> of member will be mapped with <b>City</b> in CRM
18	State/Province	state	<b>state</b> of member will be mapped with <b>Address1: State/Province</b> in CRM
19	ZIP/Postal Code	postalcode	<b>postalcode</b> of member will be mapped with <b>ZIP/Postal Code</b> in CRM
20	Country/Region	country	<b>country</b> of member will be mapped with <b>Country/Region</b> in CRM
21	Audience	list_id	<b>list_id</b> of member will be mapped with <b>Audience</b> 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	<b>id</b> of the campaign will be mapped in <b>Id</b> field of Campaign in CRM
2	Name	title	<b>title</b> of the campaign will be mapped in <b>Name</b> field of Campaign in CRM
3	Open Rate (%)	NA	Automatically calculated based on marketing activities. The number of <b>unique opens</b> divided by the total number of <b>successful deliveries</b> .
4	Click Rate (%)	NA	Automatically calculated based on marketing activities. The number of <b>unique clicks</b> divided by the total number of <b>successful deliveries</b> .
5	# Unique Opens	NA	Automatically calculated based on marketing activities. The number of unique open activities <b>per member</b> for that campaign.
6	# Unique Clicks	NA	Automatically calculated based on marketing activities. The number of unique click activities <b>per member</b> 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.	CRM Attribute Name	Mailchimp Attribute Name	Description

1	Id (MailChimp)	id	<b>id</b> of Audience will be mapped with <b>Id (MailChimp)</b> in CRM
2	Rating	list_rating	<b>list_rating</b> of Audience will be mapped with <b>Rating</b> in CRM
3	Name	name	<b>name</b> of Audience will be mapped with <b>Name</b> 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	<b>id</b> of the tag will be mapped in <b>Id</b> field of Tag in CRM
2	Audience	list_id	<b>list_id</b> of the Tag will be mapped with <b>Audience</b> in CRM
3	Name	name	<b>name</b> of the Tag will be mapped with <b>Name</b> 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	<b>id</b> of the tag will be mapped in <b>Id</b> field of Interest in CRM
2	Audience	list_id	<b>list_id</b> of the Interest will be mapped with <b>Audience</b> in CRM
3	Name	name	<b>name</b> of the Interest will be mapped with <b>Name</b> 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
1	Id	id	<b>id</b> of the tag will be mapped in <b>Id</b> field of Interest/ Group Category in CRM
2	Audience	list_id	<b>list_id</b> of the Interest will be mapped with <b>Audience</b> in CRM
3	Name/ Title	name	<b>name</b> of the Interest will be mapped with <b>Name</b> of Audience.

4	Category Type	category type	<b>category type</b> of the Interest will be mapped based on selection between <ul style="list-style-type: none"> <li>• Checkboxes</li> <li>• Dropdown</li> <li>• Radio</li> <li>• Hidden</li> </ul>
---	---------------	---------------	--

## 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	<b>action</b> field of Email Activity will be mapped with <b>Activity Type</b> field of Member Activity in CRM
2	Link Clicked	url	<b>url</b> field of Email Activity will be mapped with <b>Link Clicked</b> field of Marketing Activity in CRM in case of Click Activity
3	Campaign	campaign_id	<b>campaign_id</b> of Email Activity will be mapped with <b>Campaign</b> field in CRM
4	Regarding	email_id	<b>email_id</b> of Email Activity will be mapped with <b>Contact/Lead</b> field in CRM
5	IP	ip	<b>ip</b> of Email Activity will be mapped with <b>IP</b> field in CRM in case of Open/Click Activities

---

## Sync Mailchimp Audiences, Members, Groups and Tags to CRM

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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.

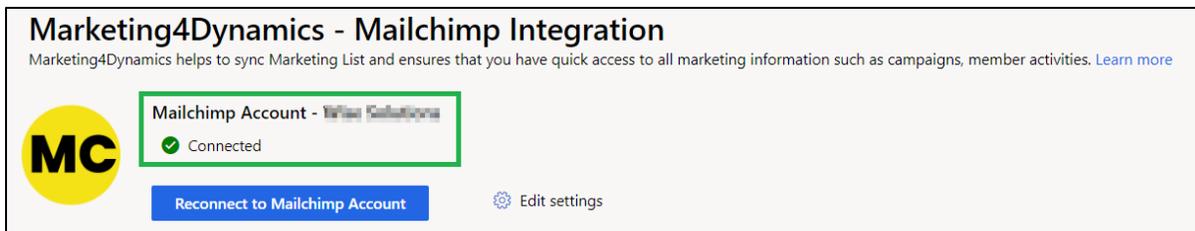
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## Design, Sync, & Send Mailchimp Campaigns Within Dynamics 365

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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.



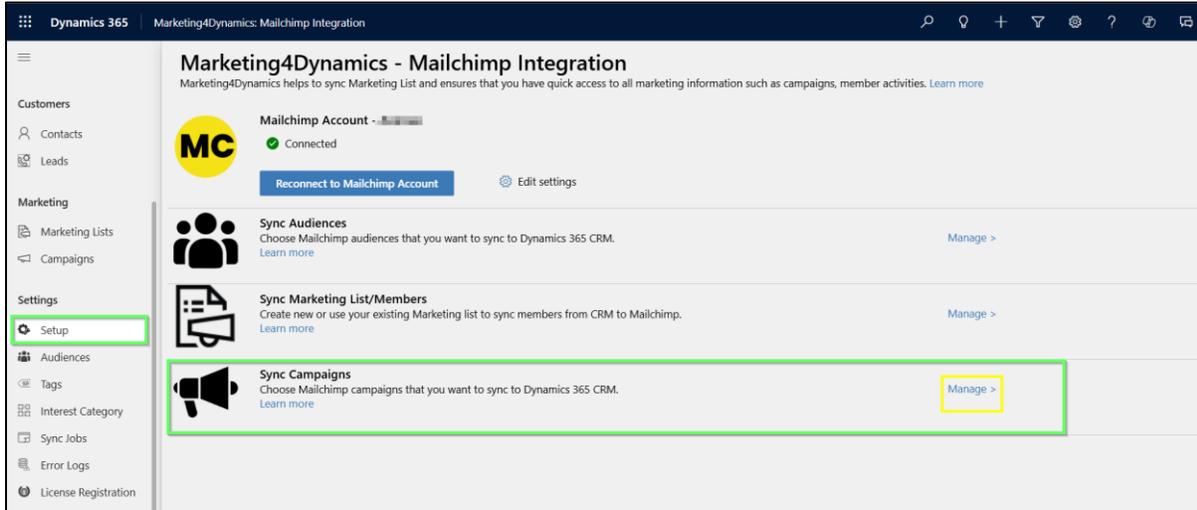
Now, open your Dynamics 365 CRM environment where **Marketing4Dynamics** is already configured.

There are two ways to create a campaign.

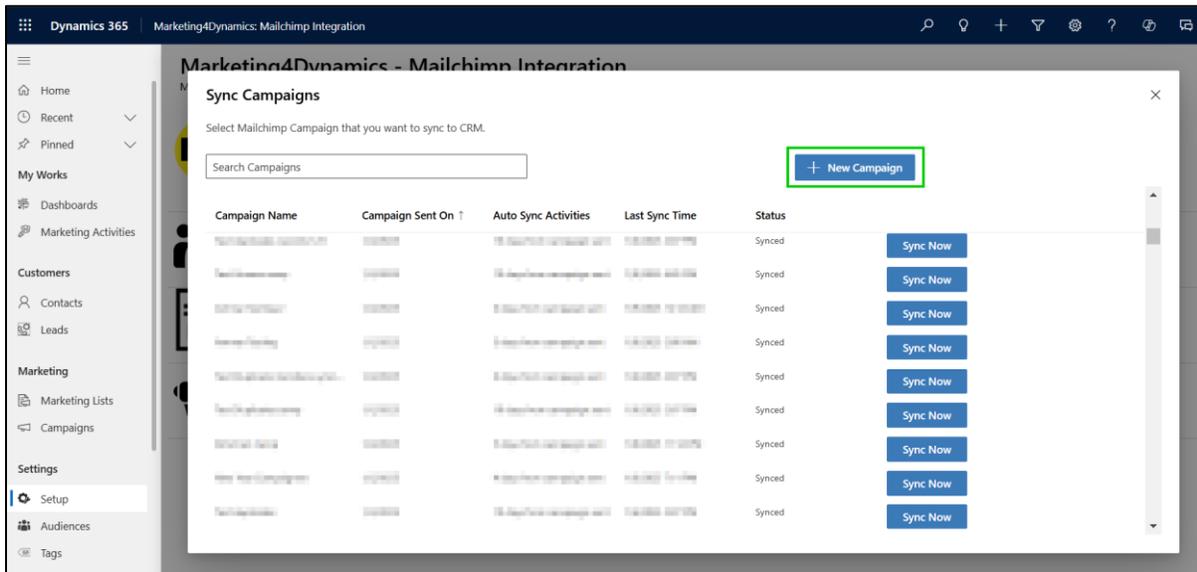
### From Setup Entity:

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

# Marketing4Dynamics – User Manual



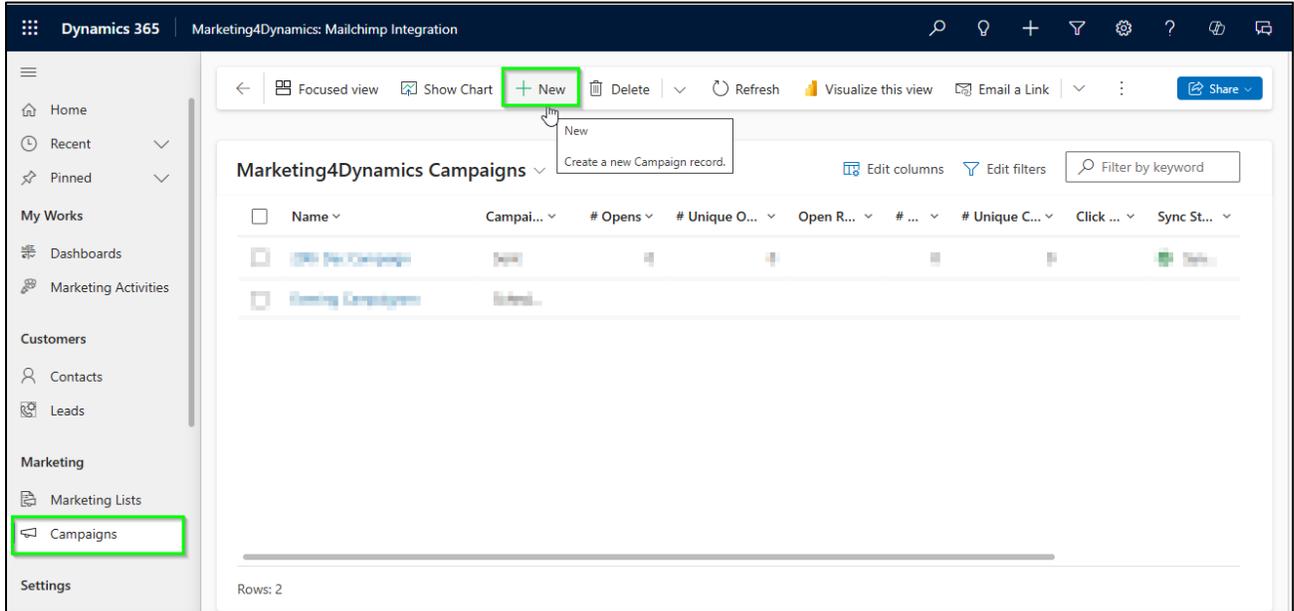
Click on “+ New Campaign” to create a new campaign.



## From Campaign Entity:

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

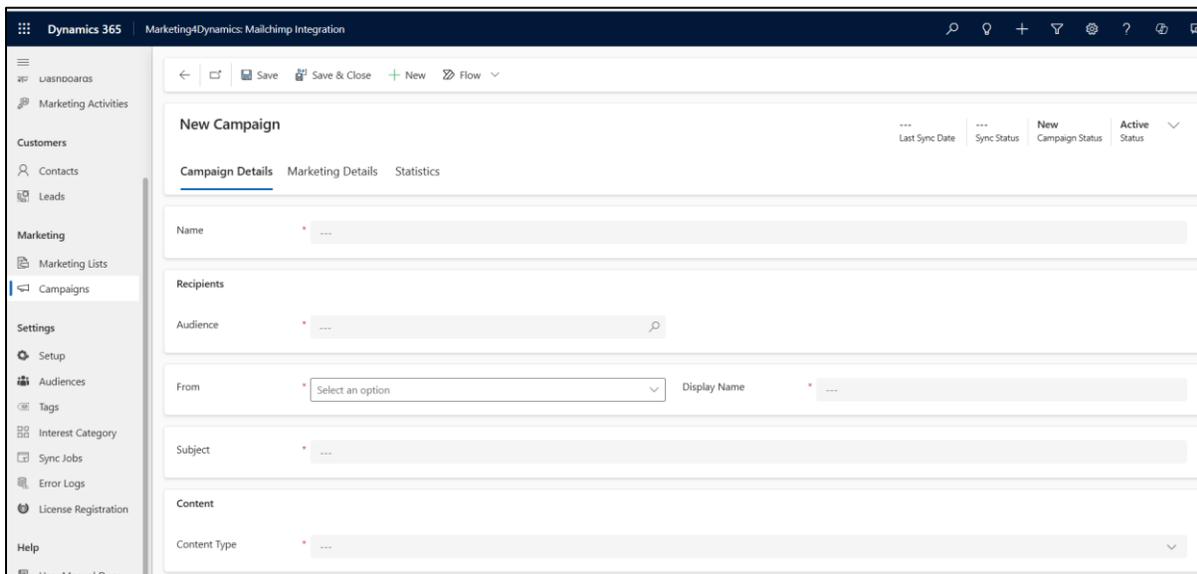
Click on **New** to create a new campaign record.



## 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**.



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

- **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.

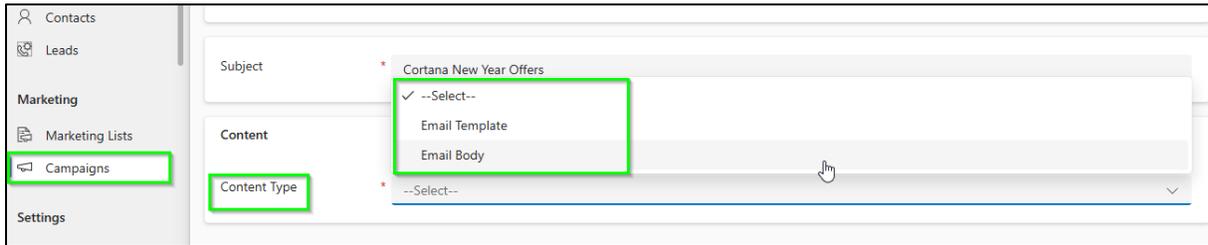
The screenshot shows a user interface for selecting tags and interests. On the left, there are two sections: 'Tags' and 'Interests'. Under 'Tags', there are five checkboxes with labels: 'Hot Leads Jan 2025', 'Hot Leads Dec 2024', 'Hot Leads Nov 2025', 'New US Leads OCT 2024', and 'New UAE Leads SAP 2024'. Under 'Interests', there are six checkboxes with labels: 'Cortana Daily Updates', 'Cortana Weekly Updates', 'Cortana Monthly Updates', 'Cortana USA', 'Cortana Europe', and 'Cortana Asia'. To the right of these lists is a large, light gray area representing a selection pane. At the top of this pane is a dropdown menu with the text 'Select an option' and a downward arrow. Below the dropdown are several horizontal bars, some of which are partially filled with gray, representing the selection of one or more items.

- **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.

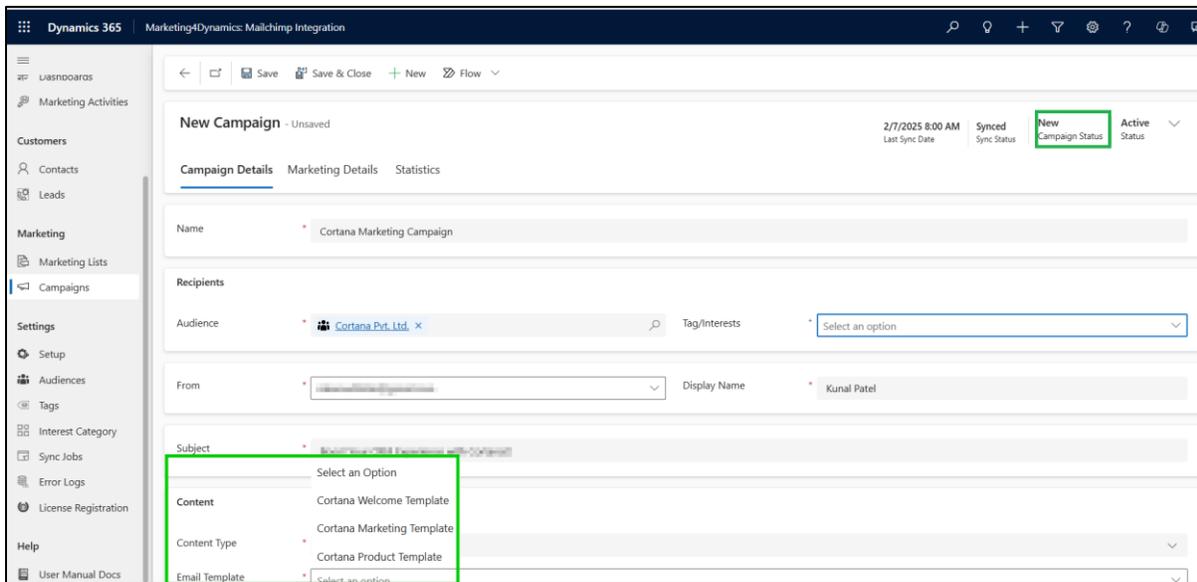
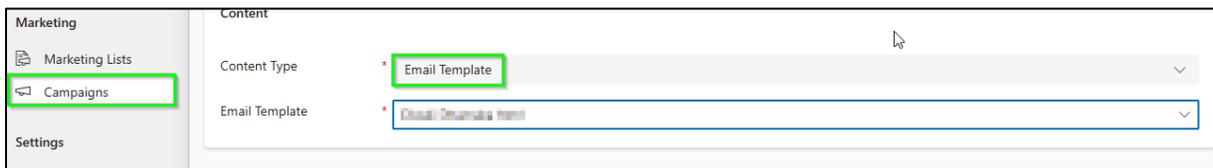
The screenshot shows the 'New Campaign' form in Dynamics 365. The form is titled 'New Campaign - Unsaved' and has a status of 'New' (highlighted in a green box) and 'Active'. The form is divided into several sections: 'Campaign Details', 'Marketing Details', and 'Statistics'. The 'Campaign Details' section includes fields for Name, Recipients, Audience, From, Display Name, Subject, Content Type, and Email Template. The 'Name' field is 'Cortana Marketing Campaign'. The 'Recipients' field is 'Cortana Pvt. Ltd.'. The 'Audience' field is 'Cortana Pvt. Ltd.'. The 'From' field is 'msb@msdynamics365.com'. The 'Display Name' field is 'Kunal Patel'. The 'Subject' field is 'Boost Your CRM Experience with Cortana!!!'. The 'Content Type' field is 'Email Template'. The 'Email Template' field is 'Select an option'. The 'Campaign Status' field is 'New' (highlighted in a green box) and 'Active'.

## Defining Campaign Content Type

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



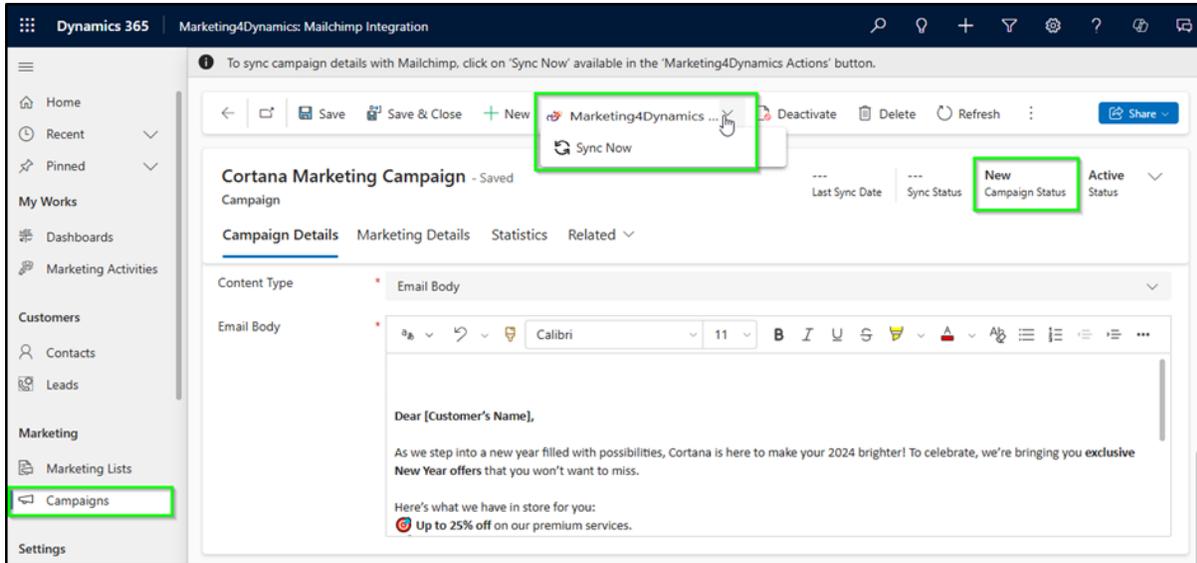
- **Email Template:** Choose an existing or pre-approved email template for your campaign, fetched directly from Mailchimp's email templates.



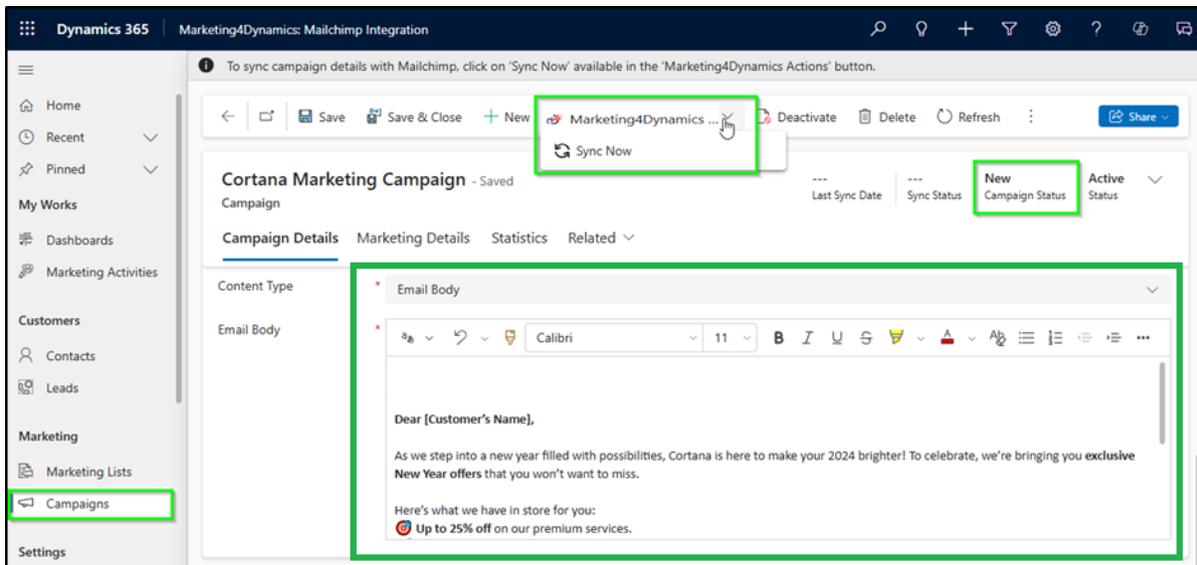
- **Email Body:** Easily create an email body that fits your campaign needs. Use rich text formatting and add your own content. You can also personalize emails with dynamic values from Mailchimp using merge tags.

[Click here](#) to learn how to use Mailchimp Merge Tags.

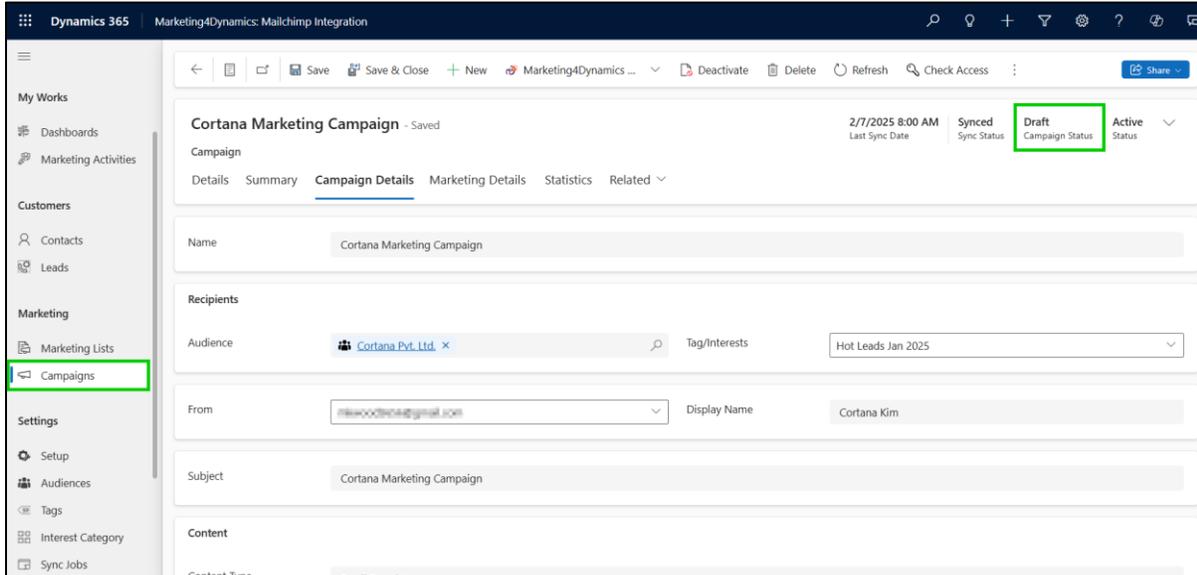
## Marketing4Dynamics – User Manual



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



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

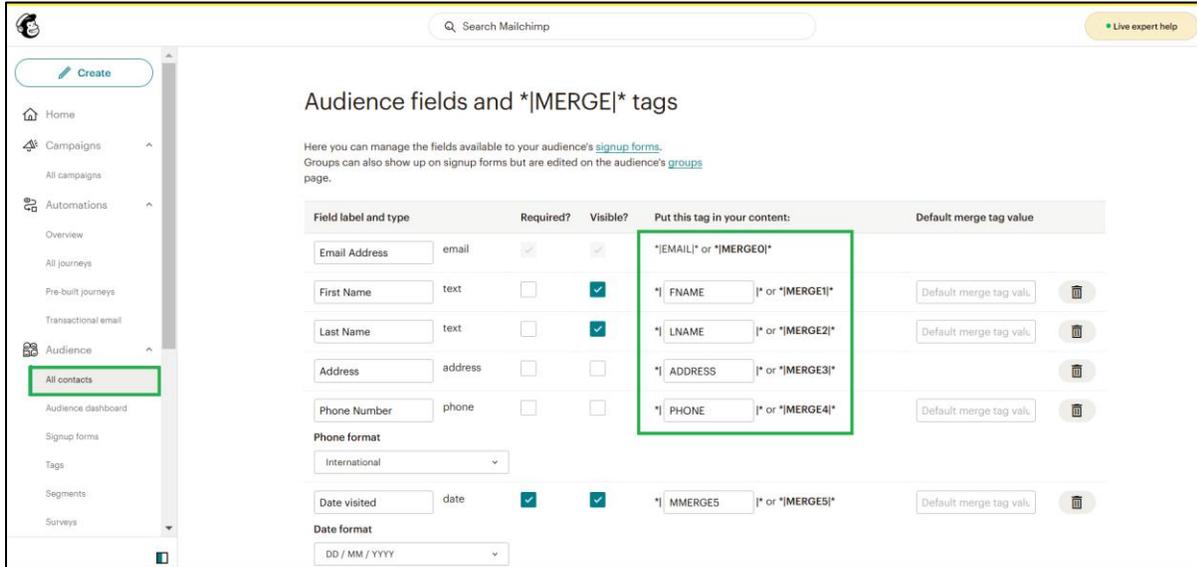


Once the syncing process is finished, the campaign details will be automatically updated in Mailchimp.

**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.

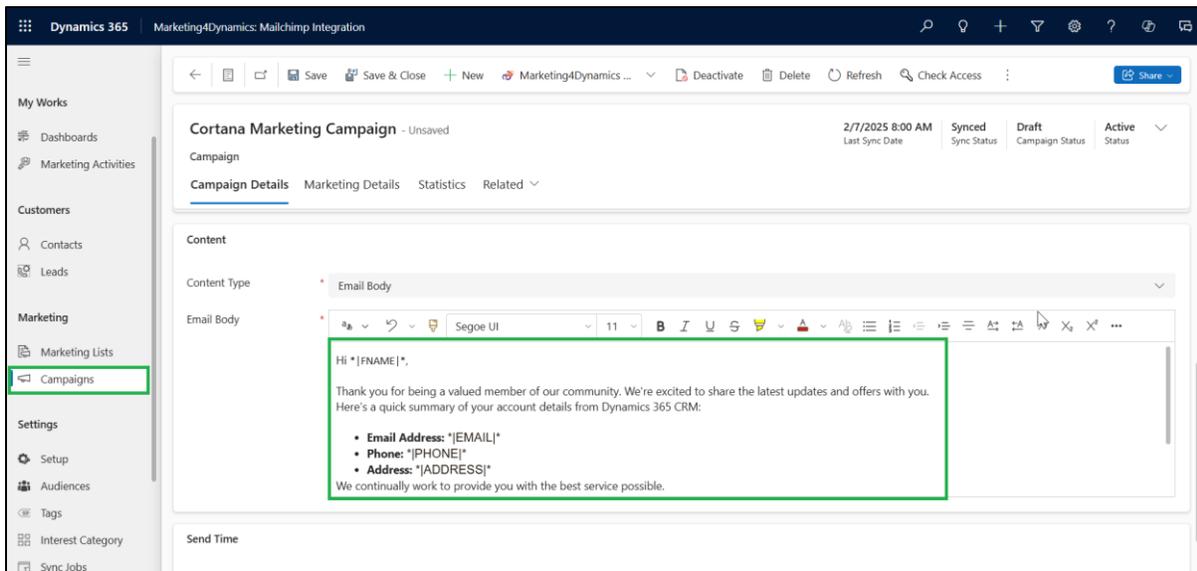
## Using Merge Tags in Mailchimp

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/*.



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.



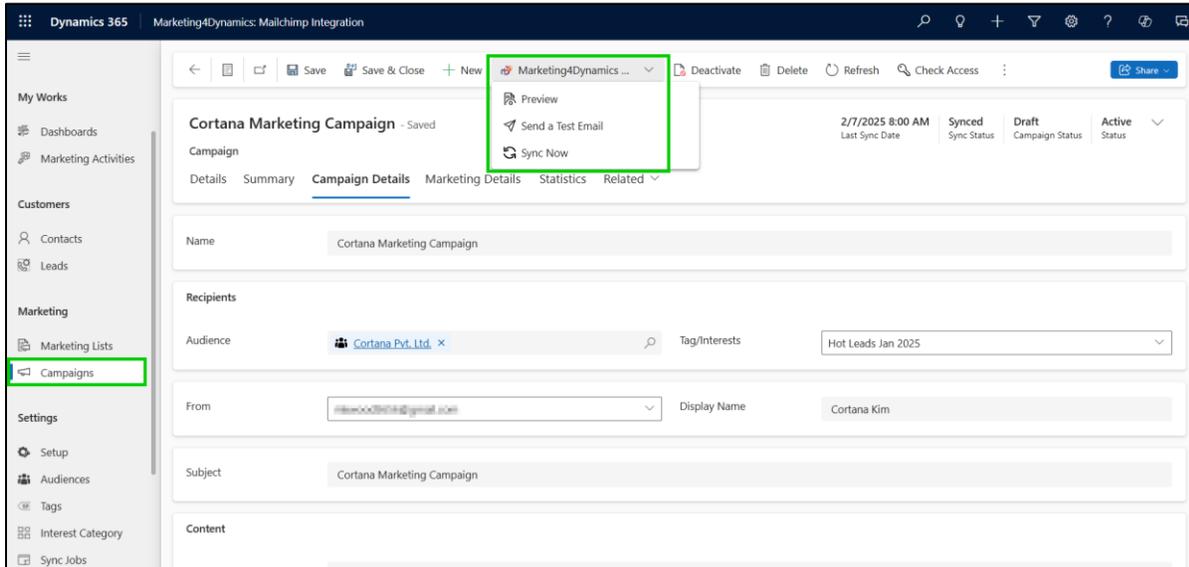
### Preview Emails Before Sending Campaigns

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

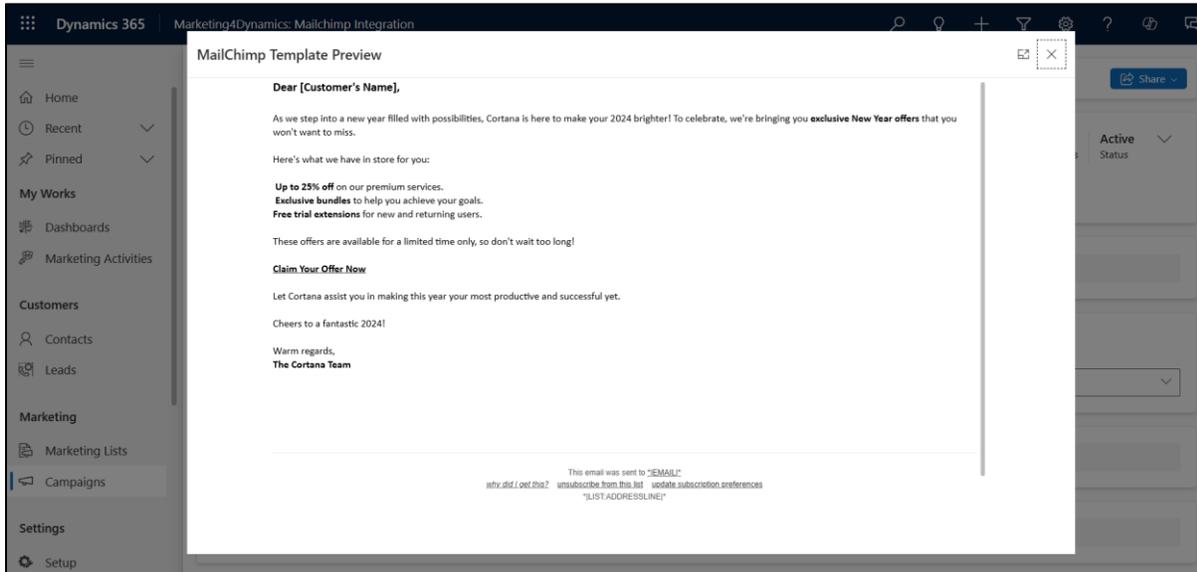
## Marketing4Dynamics – User Manual

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.**



It will display the preview of mail as shown below:

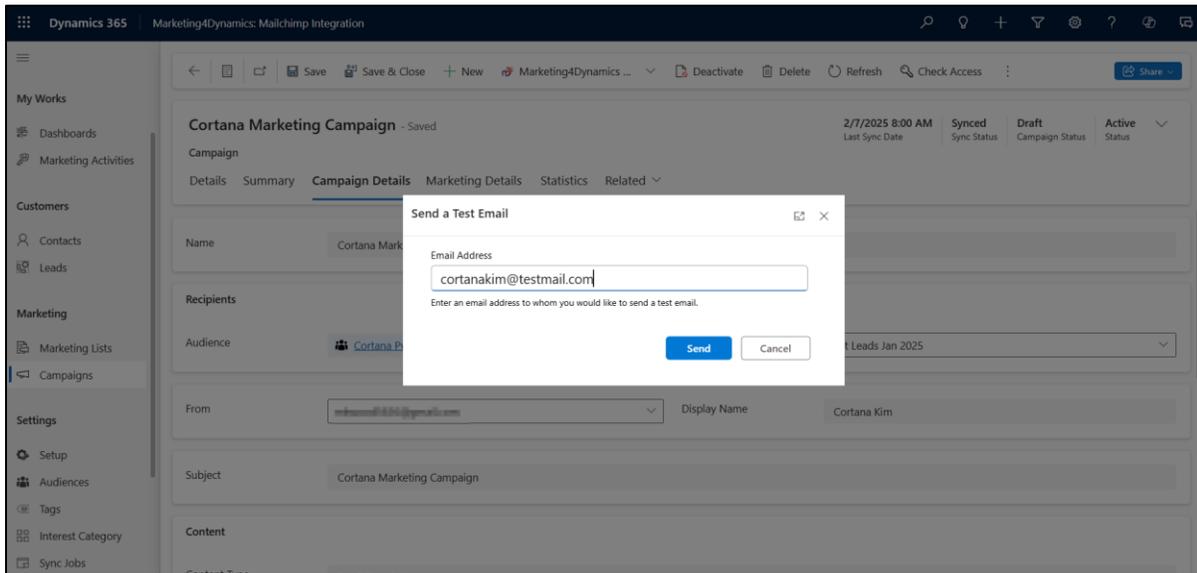


**Test Mail Delivery with "Send a Test Email"**

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.**



### **Send/Schedule Email Campaign:**

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

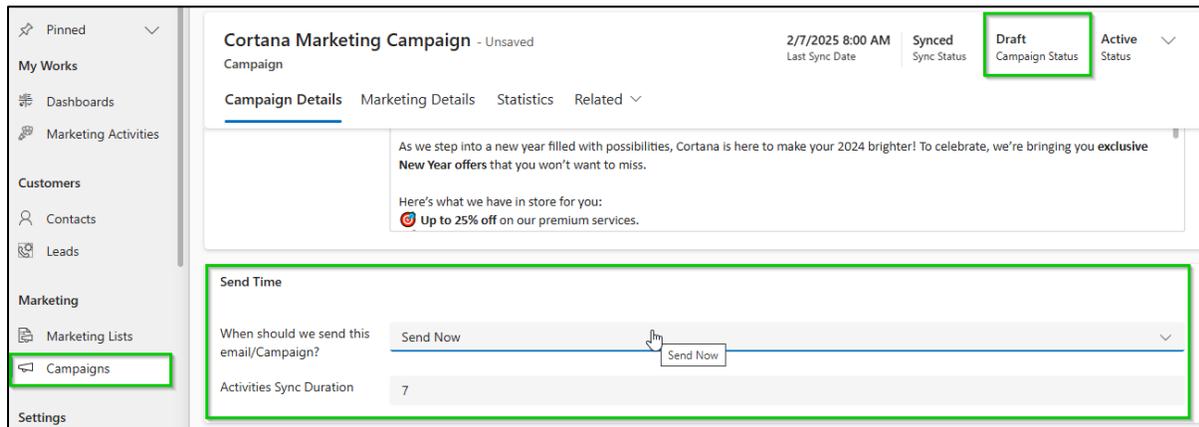
**Note:** The **Send Time** will be available only after executing **“Sync Now”** and when the campaign status changes from **New** to **Draft**.

- **Send Now:**

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

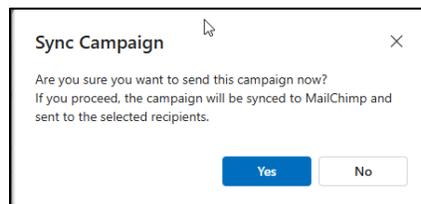
**Activities Sync Duration:** Set how long (from 1 to 365 days) you want to sync campaign activities between Dynamics 365 CRM and Mailchimp. This helps ensure all important engagement data is captured within the selected time frame. A valid sync duration is required before you can send the campaign.

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



### 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.

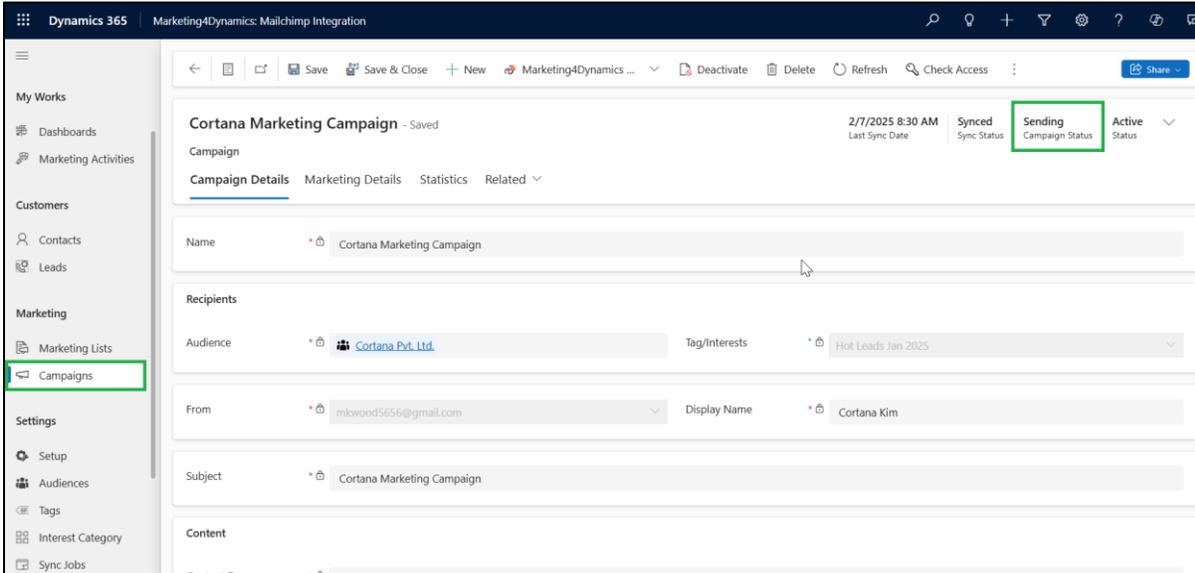


While the campaign is under execution, the status of the campaign will be changed to **“Sending”**.

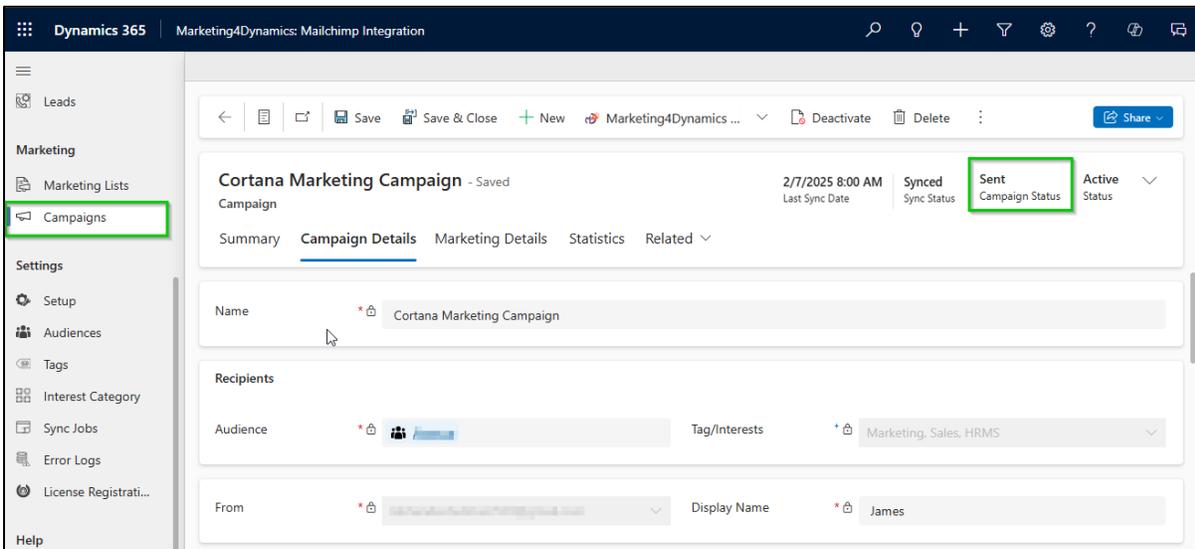
**Feature Note:** The campaign will remain in the "sending" state until all email addresses are covered. Mailchimp will handle the sending of the emails, and the ideal time for sending each email may vary by 45 minutes in Mailchimp.

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

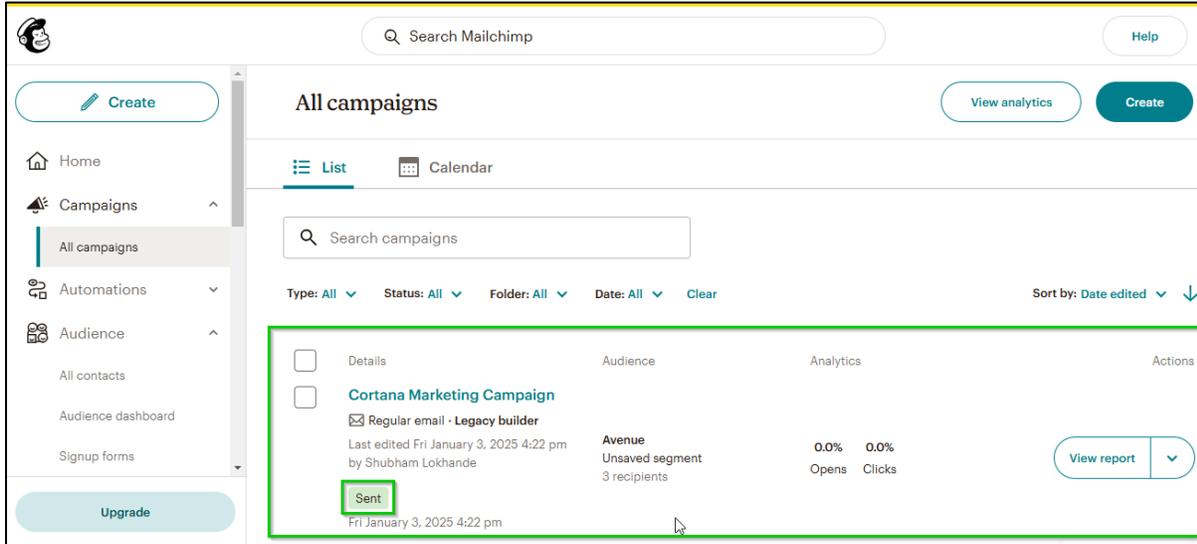
## Marketing4Dynamics – User Manual



Once execution is completed, the status of the campaign will be changed to **“Sent”**.



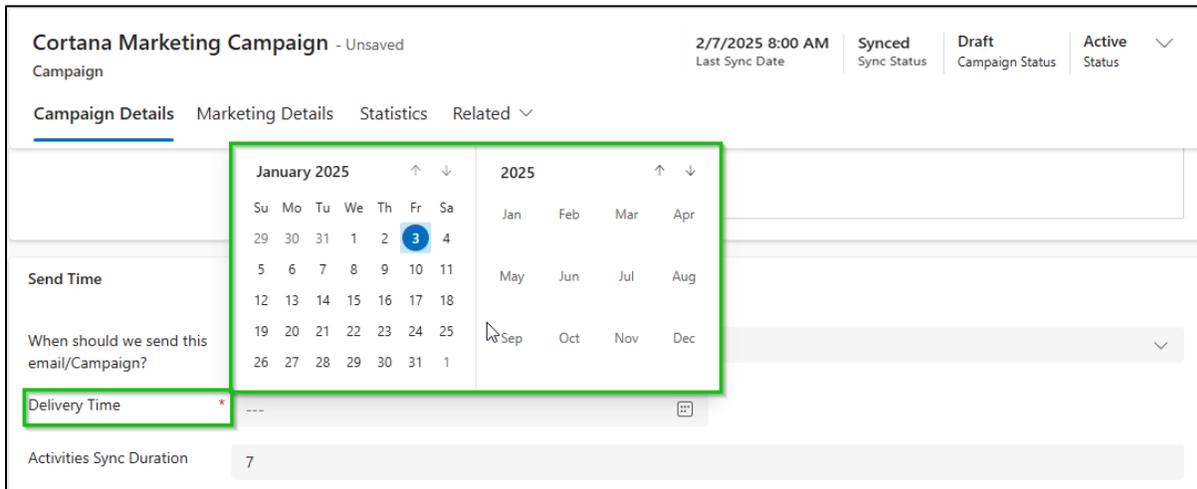
The campaign status will also be reflected in Dynamics 365 CRM, ensuring real-time synchronization.



- **Schedule Campaign:**

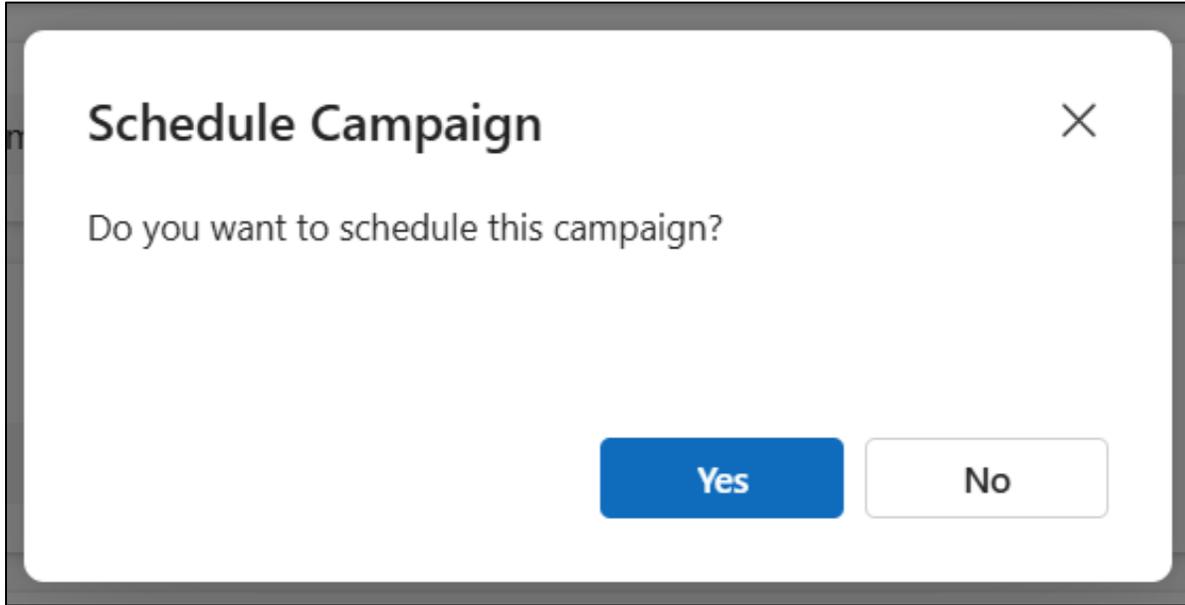
**When Should we send this email/Campaign?:** To schedule the campaign for later, simply select the “Schedule” option to launch your campaign on the designated date and time.

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

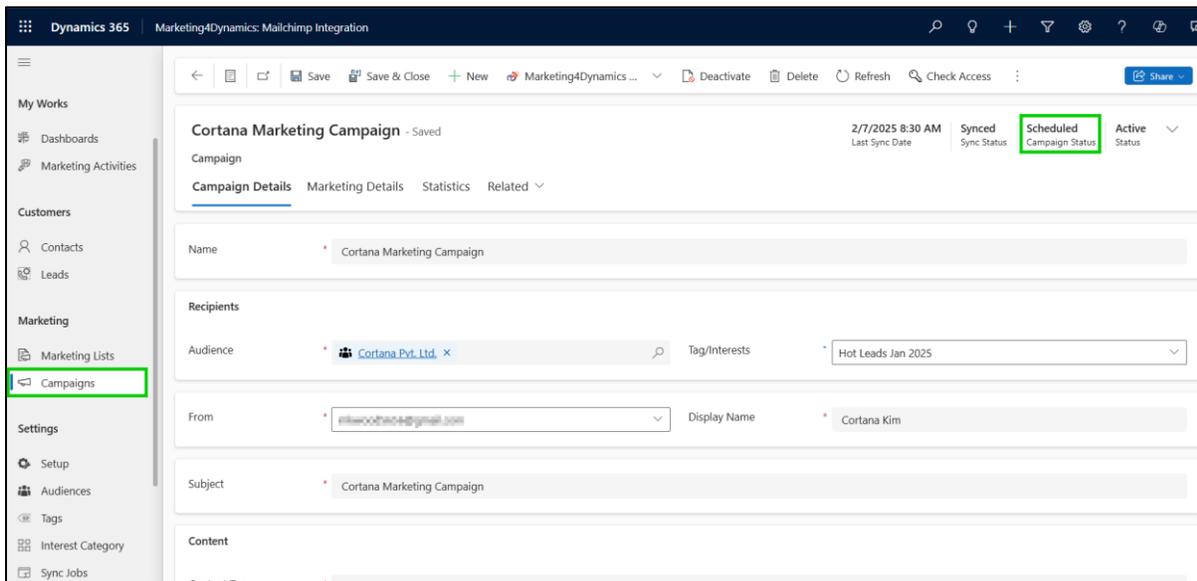


**Activities Sync Duration:** Set how long you want to sync campaign activities between Dynamics 365 CRM and Mailchimp (from 1 to 365 days). This helps ensure all important engagement data is captured within the selected time frame. A valid sync duration is required before you can send the campaign.

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



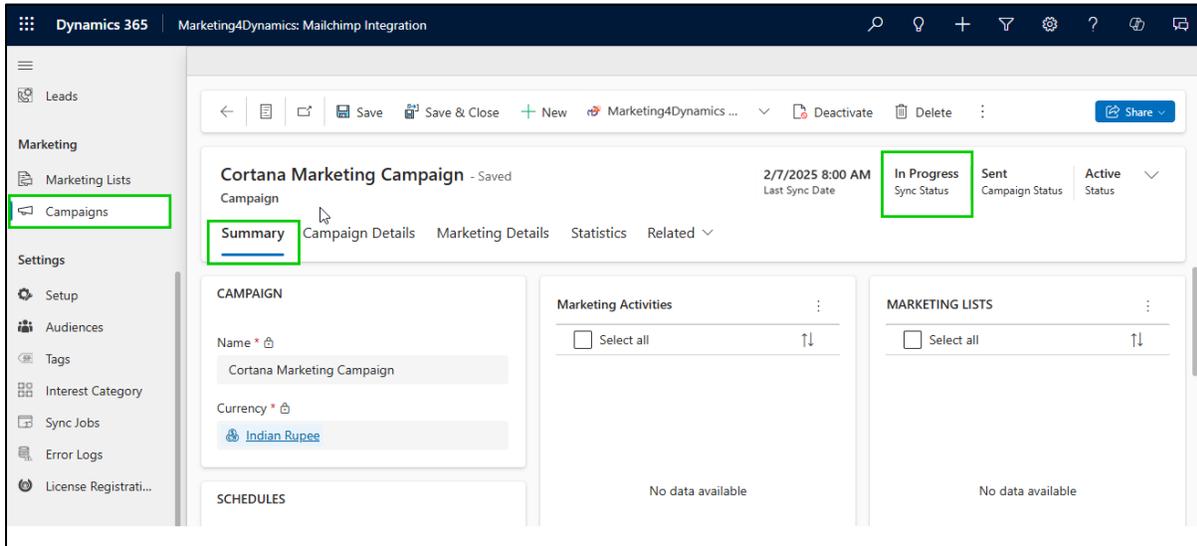
Once the campaign is successfully scheduled, the status will automatically update to **"Scheduled"**, ensuring a seamless workflow and timely campaign execution.



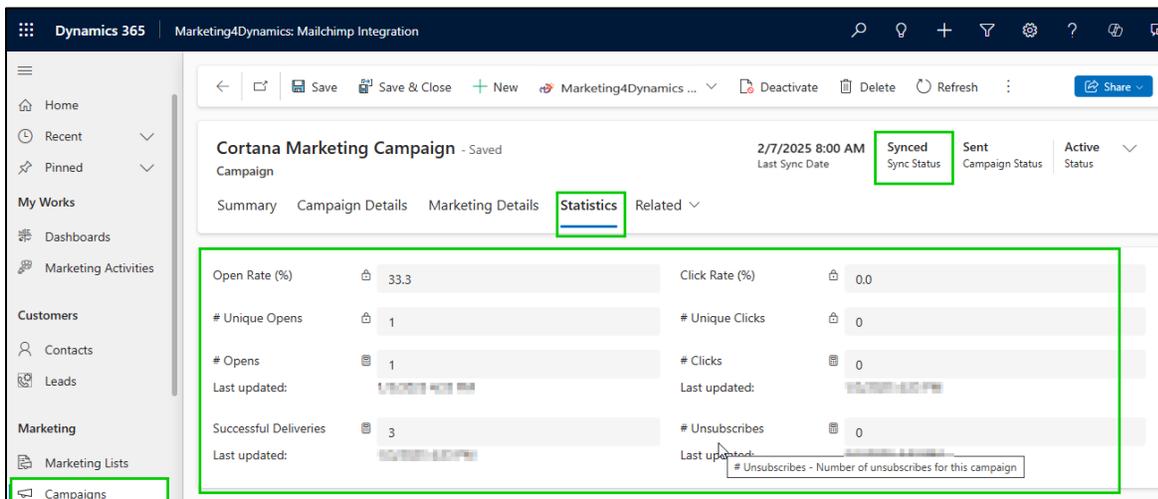
### Campaign Performance Tracking

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.



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:



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

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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.

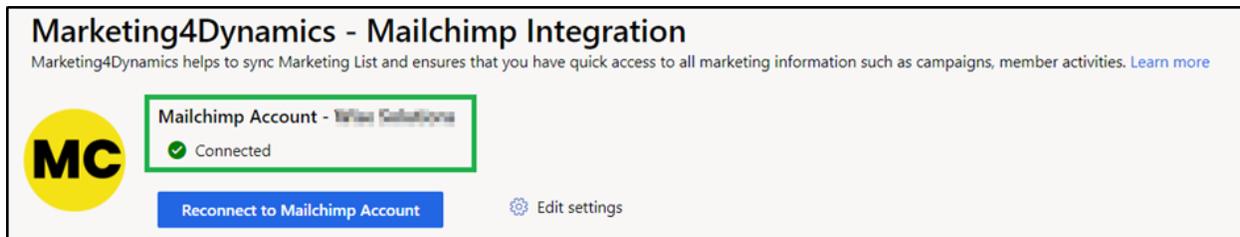
Understand Mailchimp Customer Journey with an example.

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.

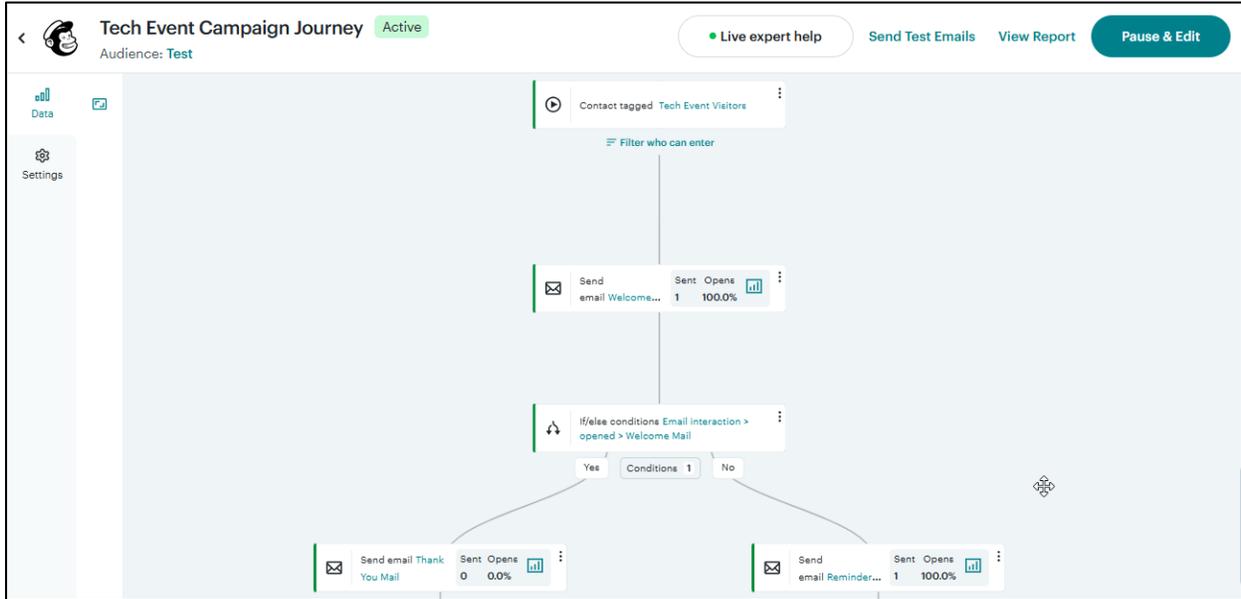
Let's explore how to capture and track email activities generated through Mailchimp Customer Journeys within Dynamics 365 CRM.

**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



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.

The screenshot shows the "All Journeys" page in Mailchimp. The left sidebar has "All journeys" highlighted. The main content area shows a table of journeys. The first row is highlighted with a green box:

Status	Created	Started	In Progress	Completed	View Report
Active	since 26 March 2025	1	0	1	View Report
Draft	since 26 March 2025				Final Step
Draft	since 26 March 2025				Final Step
Draft	since 26 March 2025				View Report

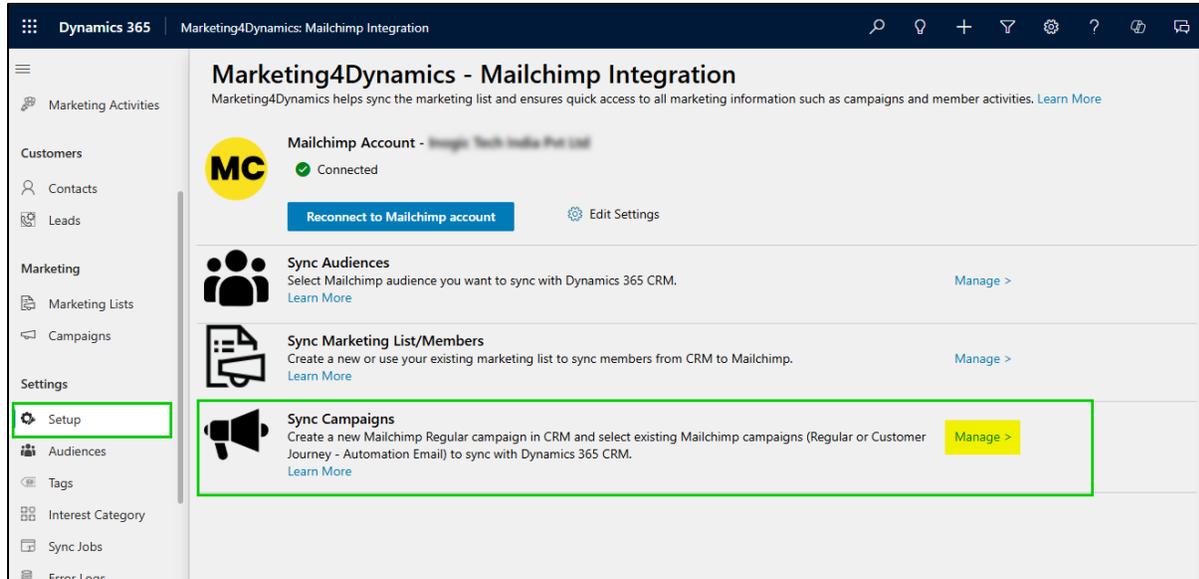
After executing the automated email campaign, track its performance in Dynamics 365 CRM:

### Syncing Automation Email Campaign Data in Dynamics 365 CRM

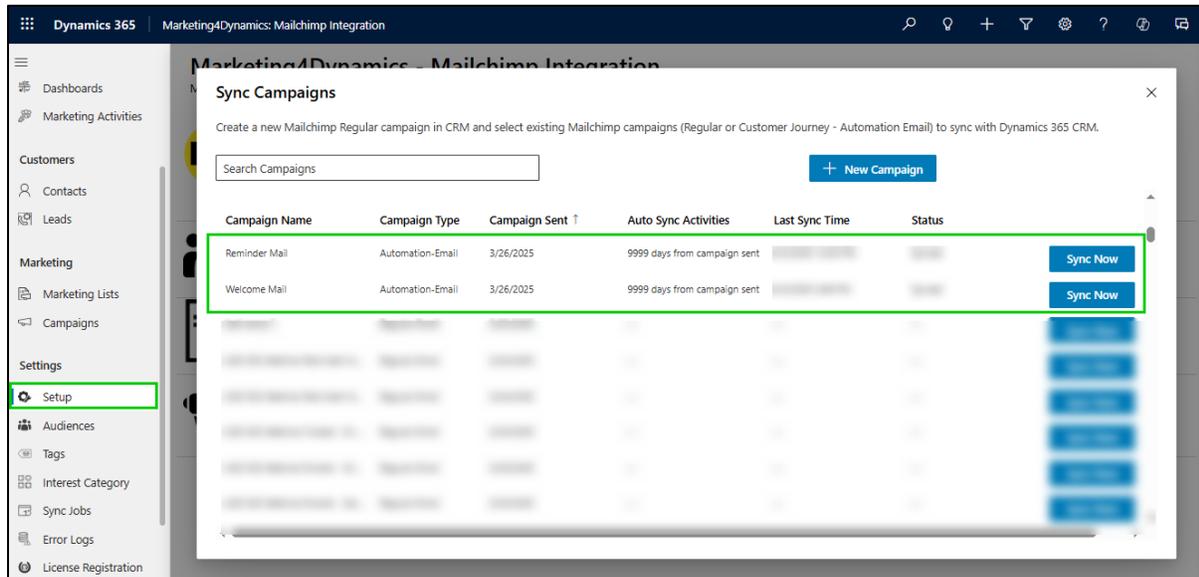
To fetch the latest campaign details in Dynamics 365 CRM:

## Marketing4Dynamics – User Manual

- 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.



**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

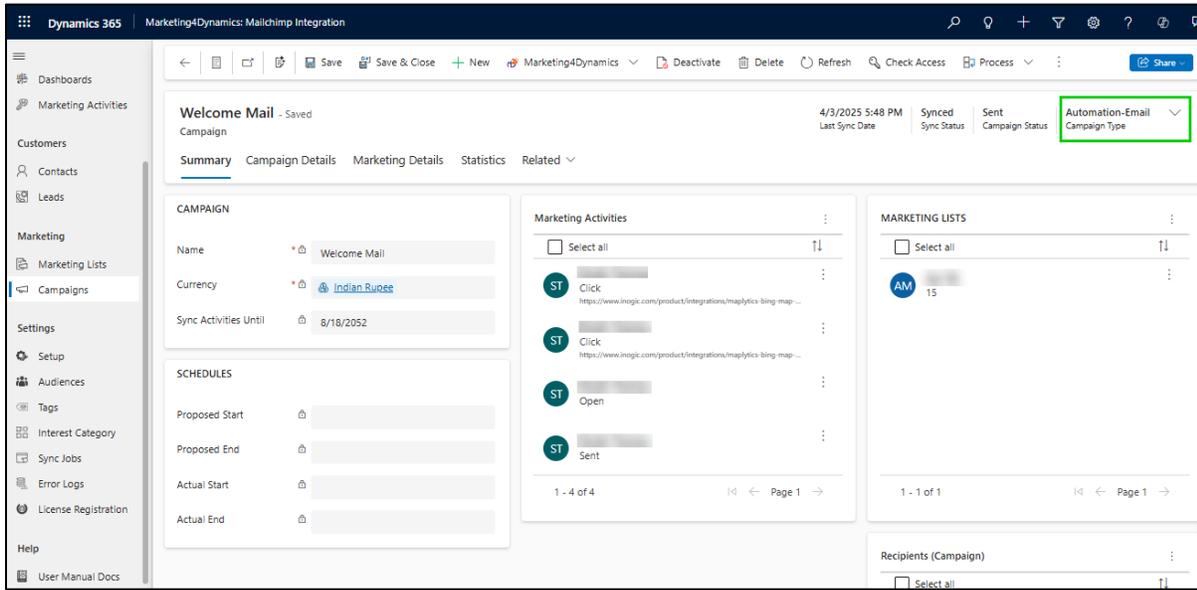
To analyze the campaign performance in Dynamics 365 CRM:

- Navigate to the **Campaign** entity in Marketing4Dynamics.

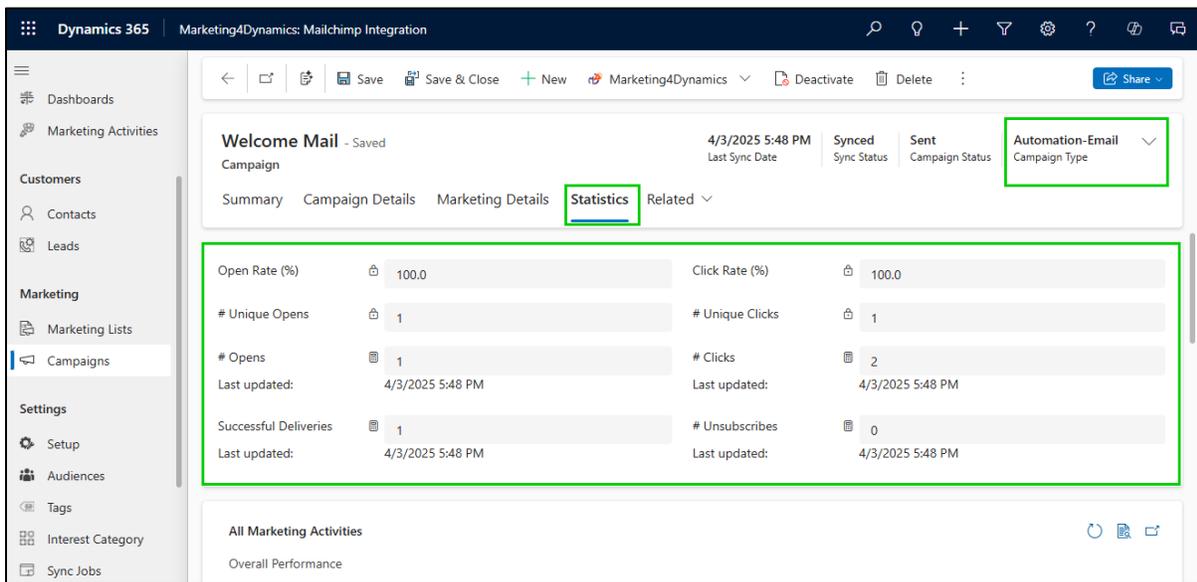
Name	Campaign Status	Campaign Type	# Opens	# Unique O...	Open Rate	# Clicks	# Unique Clicks	Click Rate	Sync Status
Welcome Mail	Sent	Automation-Email	1	1	100.0	2	1	100.0	Synced
	Sent	Automation-Email	2	1	100.0	3	1	100.0	Synced
	Sent	Regular-Email	1	1	100.0	0	0	0.0	Synced
	Sent	Regular-Email	1	1	33.3	0	0	0.0	Synced
	Sent	Regular-Email	1	1	33.3	0	0	0.0	Synced
	Sent	Regular-Email	1	1	33.3	0	0	0.0	Synced
	Sent	Regular-Email	1	1	33.3	0	0	0.0	Synced
Reminder Mail	Sent	Automation-Email	2	1	100.0	3	1	100.0	Synced
	Sent	Automation-Email	2	1	50.0	2	1	50.0	Synced
	Sent	Automation-Email	3	2	100.0	1	1	50.0	Synced

- 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.

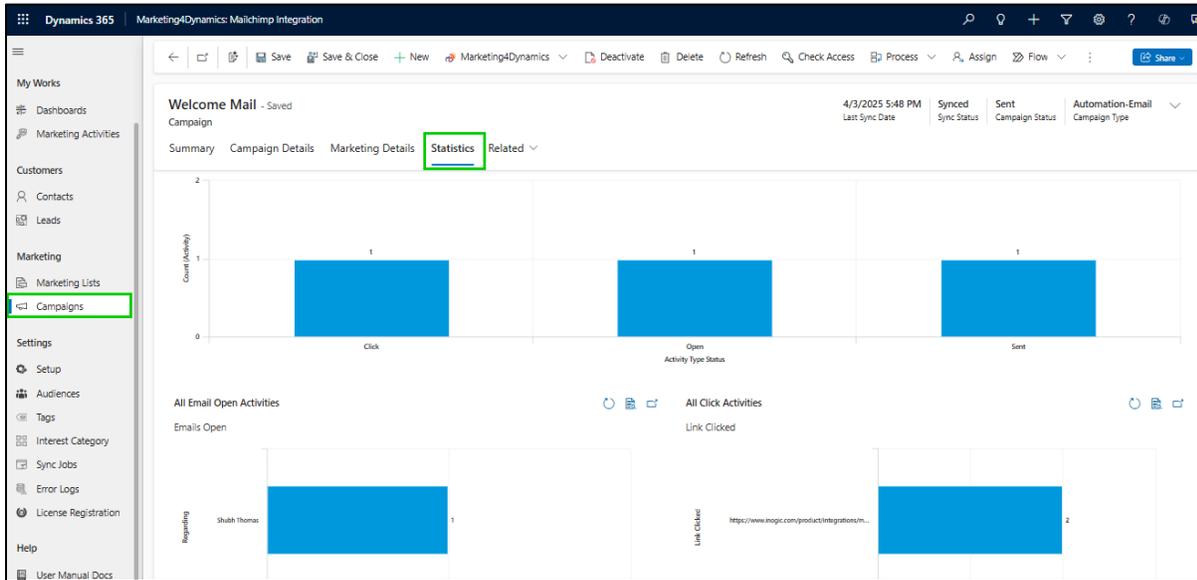
# Marketing4Dynamics – User Manual



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



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

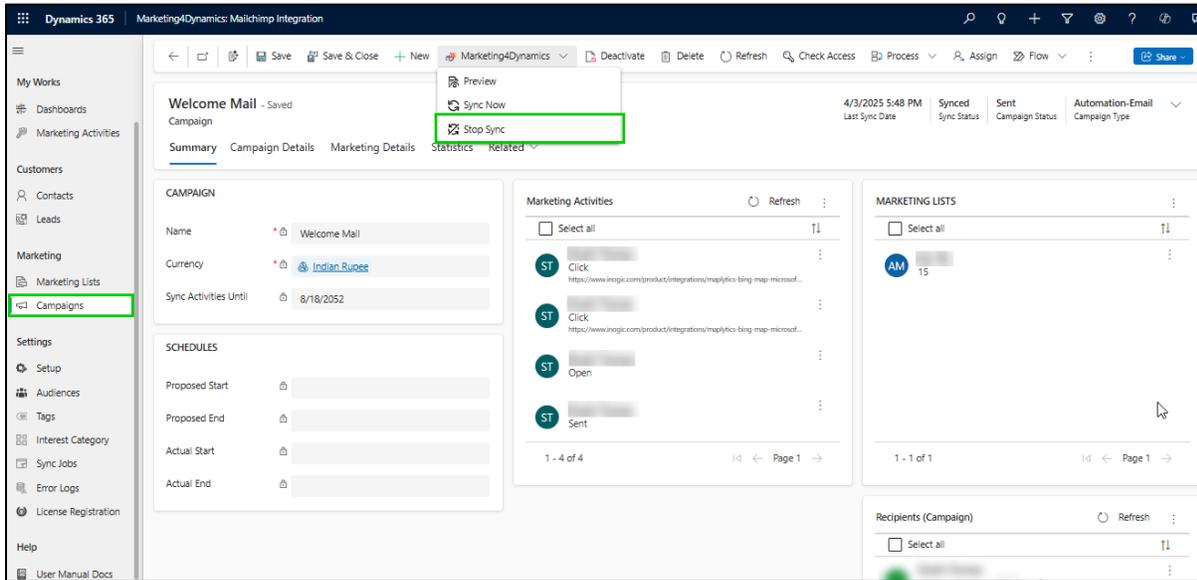
## Stop Syncing Automated/Regular Email Campaign Activities

### 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.

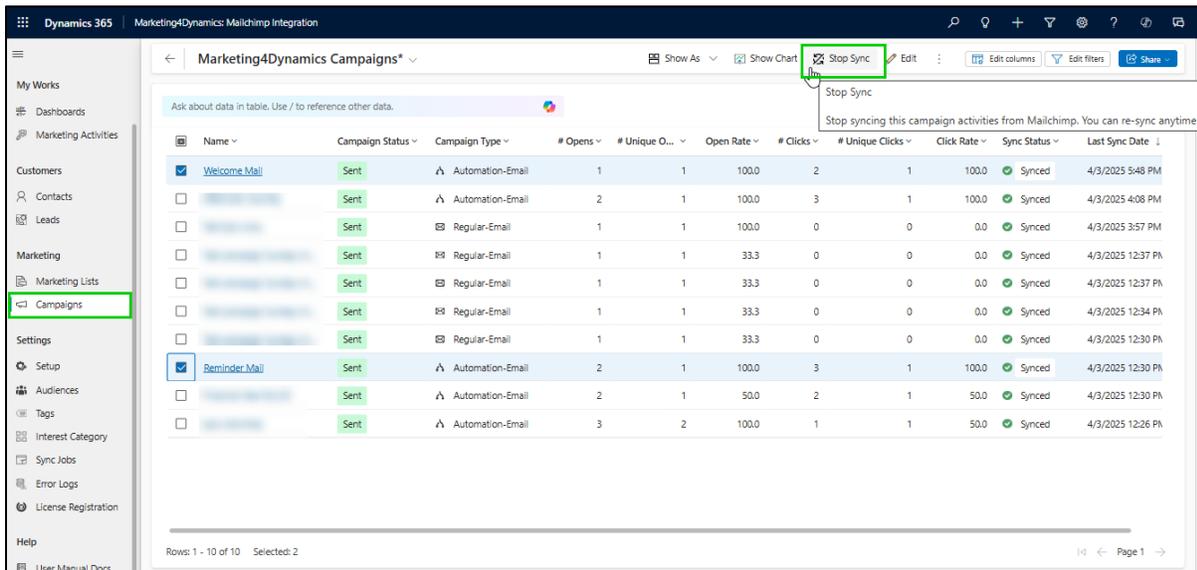
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## For Multiple Mails:

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.



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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Name	Campaign Status	Campaign Type	# Opens	# Unique O...	Open Rate	# Clicks	# Unique Clicks	Click Rate	Sync Status	Last Sync Date
Welcome Mail	Sent	Automation-Email	1	1	100.0	2	1	100.0	Paused	4/3/2025 5:48 PM
	Sent	Automation-Email	2	1	100.0	3	1	100.0	Synced	4/3/2025 4:08 PM
	Sent	Regular-Email	1	1	100.0	0	0	0.0	Synced	4/3/2025 3:57 PM
	Sent	Regular-Email	1	1	33.3	0	0	0.0	Synced	4/3/2025 12:37 PM
	Sent	Regular-Email	1	1	33.3	0	0	0.0	Synced	4/3/2025 12:37 PM
	Sent	Regular-Email	1	1	33.3	0	0	0.0	Synced	4/3/2025 12:34 PM
	Sent	Regular-Email	1	1	33.3	0	0	0.0	Synced	4/3/2025 12:30 PM
Reminder Mail	Sent	Automation-Email	2	1	100.0	3	1	100.0	Paused	4/3/2025 12:30 PM
	Sent	Automation-Email	2	1	50.0	2	1	50.0	Synced	4/3/2025 12:30 PM
	Sent	Automation-Email	3	2	100.0	1	1	50.0	Synced	4/3/2025 12:26 PM

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

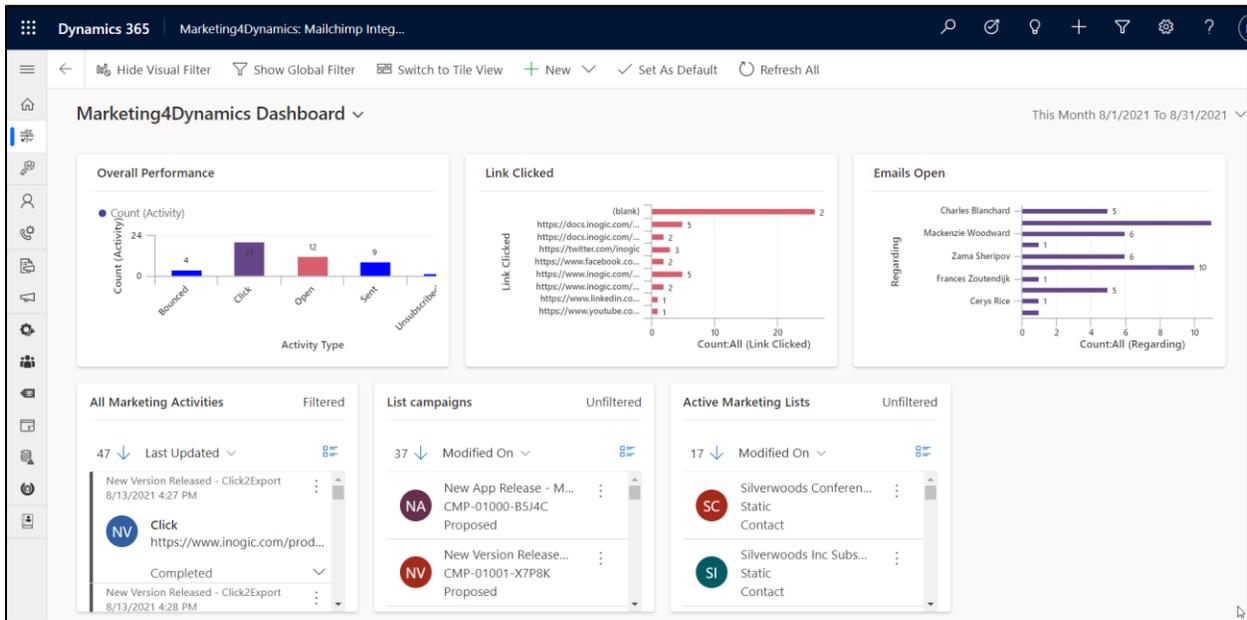
The screenshot shows the 'Welcome Mail' campaign form. The 'Sync Now' button in the dropdown menu is highlighted with a green box. The form includes sections for Campaign details, Marketing Activities, and Marketing Lists.

## 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.

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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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