



**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.

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	<a href="#">Sync Now</a>
Wise Solutions Subscribers	Address Contents Canada	--	Wise Solutions Address Conte	1/6/2022 9:17 AM	Synced	<a href="#">Sync Now</a>
Wise Solutions Subscribers	Clicked Last 5 Campaigns	--	--	1/6/2022 9:17 AM	Synced	<a href="#">Sync Now</a>
Wise Solutions Subscribers	Created_12 November 2021	--	--	1/6/2022 9:17 AM	Synced	<a href="#">Sync Now</a>
Wise Solutions Subscribers	Created on 16th Nov 2021	--	--	1/6/2022 9:17 AM	Synced	<a href="#">Sync Now</a>

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) Search this view

Full Name	Email	Company Name	Business Phone	Sync Status
Abellonan Schultz	abellonanschultz@aol.com	---	770-665-1965	Synced
Anke Schwartz	AnkeSchwartz@telemorm.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@outk.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

Dynamics 365 | Marketing4Dynamics: Mailchimp Integ...

Silverwoods Inc Subscribers  
Marketing List Synced 8/13/2021 4:12 PM  
Last Sync Date

Summary **Members** Notes Related

Members

Full Name	Email	Company Name	Business Phone	Sync Status
Abellonan Schultz	abellonanschultz@aol.com	---	770-665-1965	Synced
Anke Schwartz	AnkeSchwartz@telemorm.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@outk.com	---	303-887-5516	Synced
Roy Harper	royharperhood@gmail.com	---	815-895-8732	Synced

Audience

Audience dashboard

All contacts

Signup forms

Tags

Segments

Surveys

Preferences center **New**

Inbox

Charles  
Silverwoods Inc

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 Grasseilli Street Lebanon, NH 03786 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@telemorm.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@outk.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	

Audience

Current audience

Silverwoods Inc v

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 Grasseilli Street Lebanon, NH 03786 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@telemorm.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.

This screenshot shows the 'Conference Leads' tag details in Dynamics 365 CRM. The tag ID is 2238510 and it is associated with the 'Silverwoods Inc' audience. The 'Sync Status' is highlighted as 'Synced'.

Field	Value
Id	2238510
Audience	Silverwoods Inc
Sync Status	Synced

This screenshot shows the 'Audience' page in Dynamics 365 CRM. The 'Tags' section is active, displaying a list of tags. The 'Conference Leads' tag is highlighted.

Tag Name	Created
Conference Leads	8/13/21 4:57AM
Customers	8/13/21 4:58AM
Influencer	8/13/21 4:57AM
Online Sales	8/13/21 4:57AM
Partner	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.

This screenshot shows the 'New Campaign' form in Dynamics 365 CRM. The campaign name is 'Cortana Marketing Campaign'. The audience is 'Cortana Pvt. Ltd.'. The subject is 'Boost Your CRM Experience with Cortana!!!'. The 'Marketing4Dynamics' button is highlighted.

Field	Value
Name	Cortana Marketing Campaign
Audience	Cortana Pvt. Ltd.
Subject	Boost Your CRM Experience with Cortana!!!

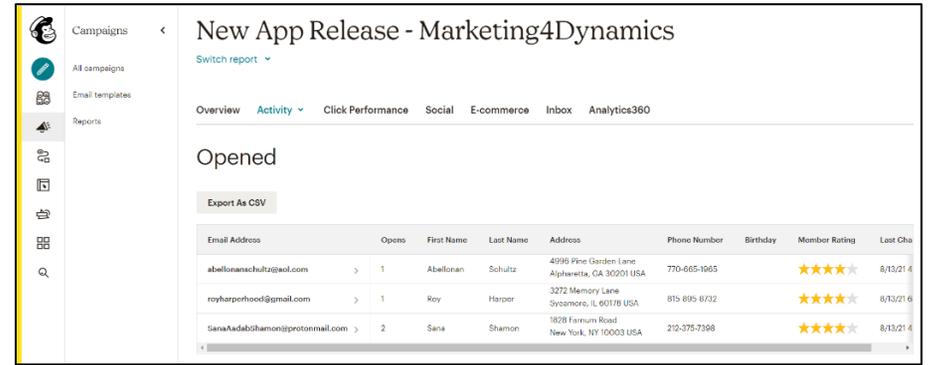
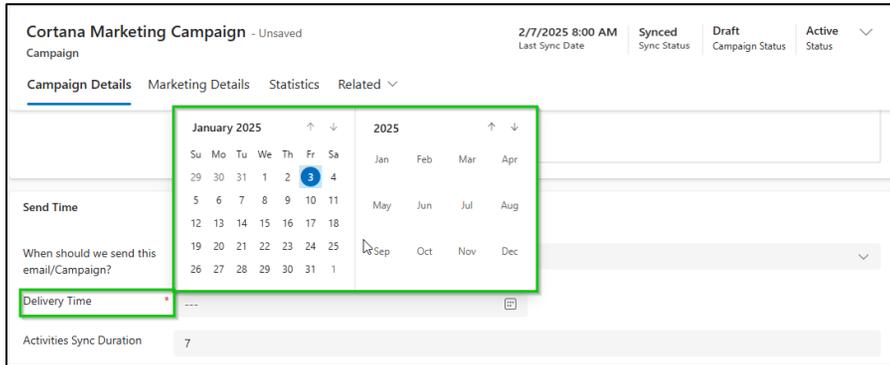
This screenshot shows the 'Cortana Marketing Campaign' details in Dynamics 365 CRM. The 'Marketing4Dynamics' button is highlighted, and the 'Sync Now' button is also highlighted. The email body content is visible.

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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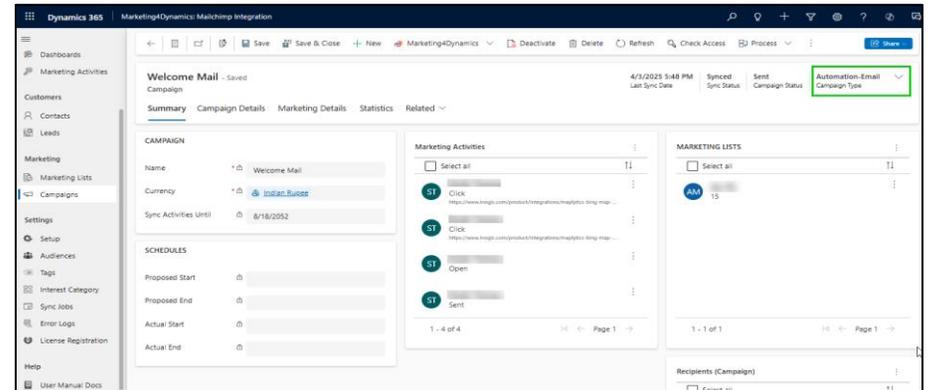
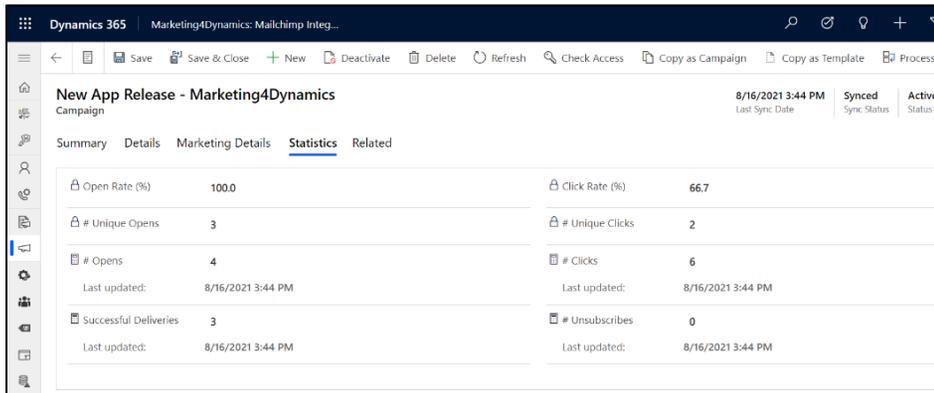


## Sync Campaigns

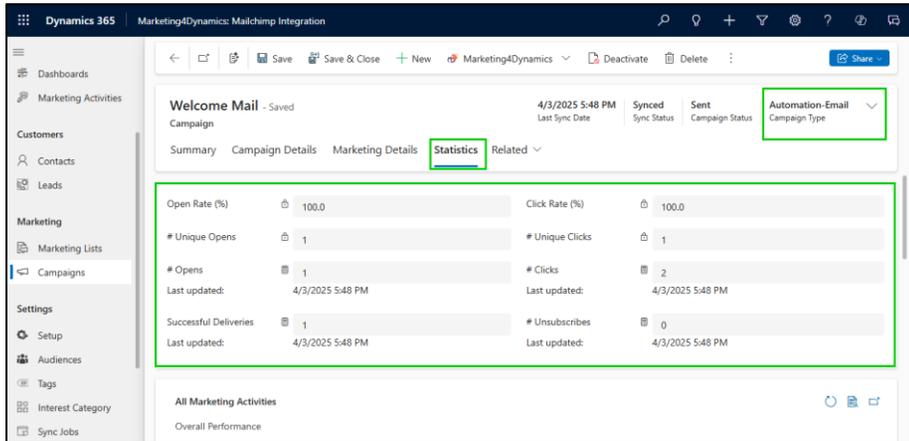
Sync all the campaigns in Mailchimp which has been sent to the subscribers to Dynamics 365 CRM.

## MailChimp Customer Journey Activity Syncing

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

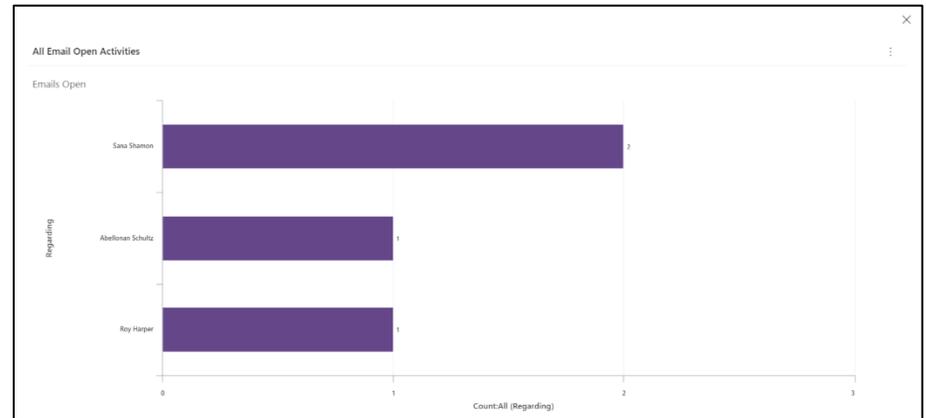
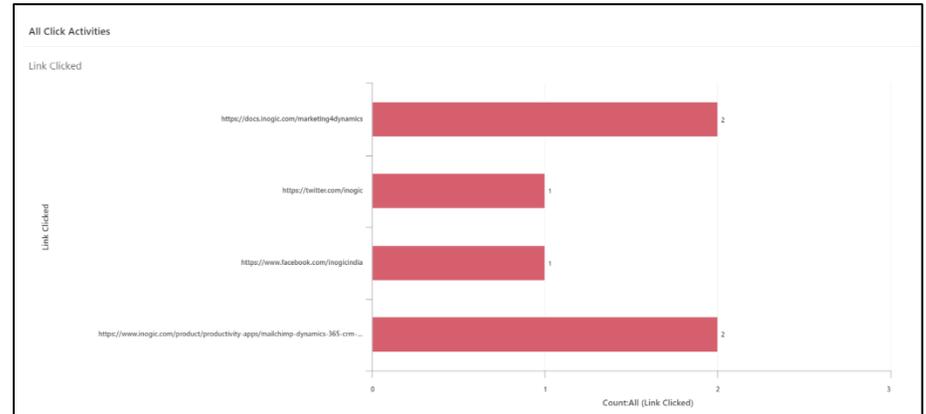
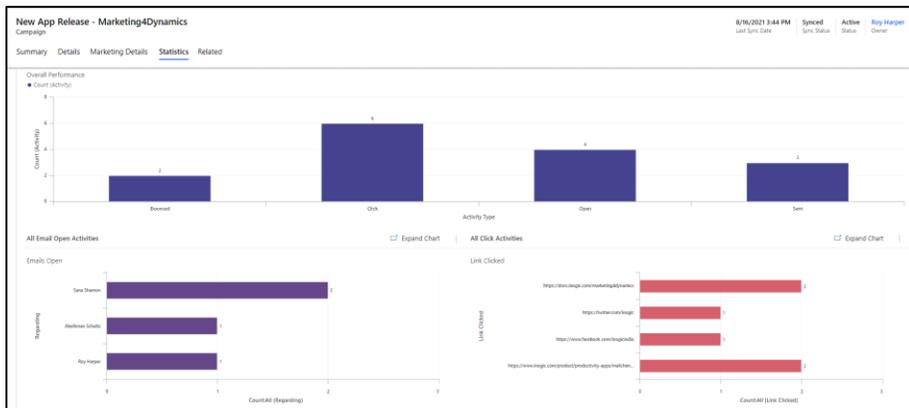


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## Dashboard & Campaign Statistics

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



## Contact Us

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