



Microsoft Dynamics® CRM

Dynamics 365

**XRM.EmailMarketing AddOn for MailChimp**

**Installation Guide**



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## Registration and download of AddOns

First step in using XRM.EmailMarketing is to register and to download AddOn.

Registration is done at <http://www.powerxrm.com/register/> by filling the registration form:

 REGISTER OR LOGIN TO OUR XRM COMMUNITY

**USERNAME**

THE USERNAME MUST BE IN THE FORM OF AN EMAIL ADDRESS

**FIRST NAME**

**LAST NAME**

**ORGANIZATION**

**PHONE NUMBER**

**PASSWORD**

.....

**CONFIRM PASSWORD**

**REASONS TO JOIN**

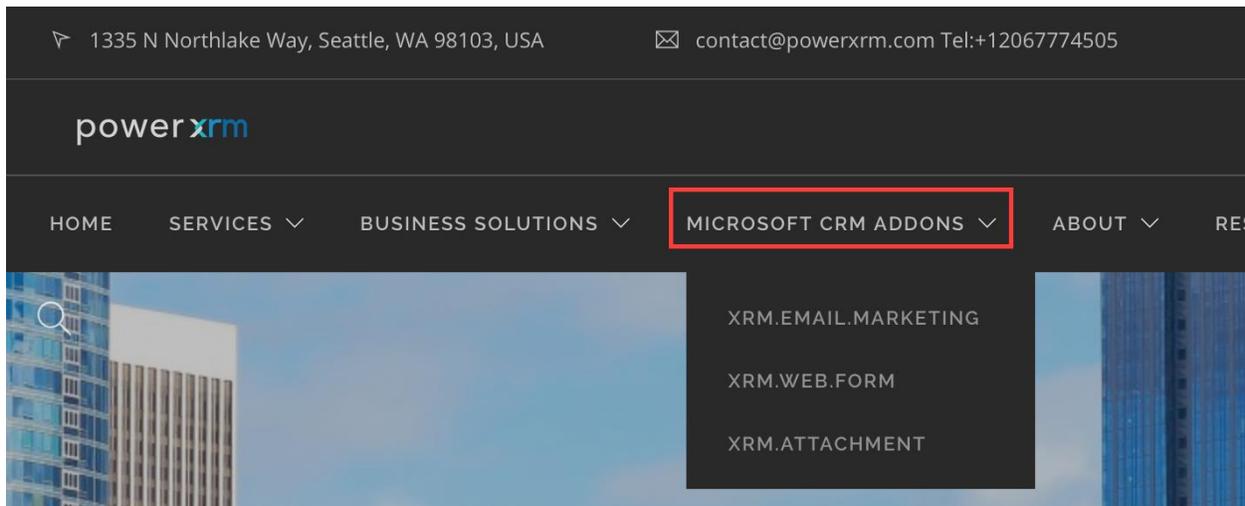


Download our AddOns  



You need to fill in data such as username (valid email address) that will be used as a license when using AddOn, first name, last name, password, etc. And, at the bottom of the page, you need to select the reason of registration: Download our AddOns. When you fill in the data and click Register, you will get an email with confirmation request. You need to confirm your email and registration.

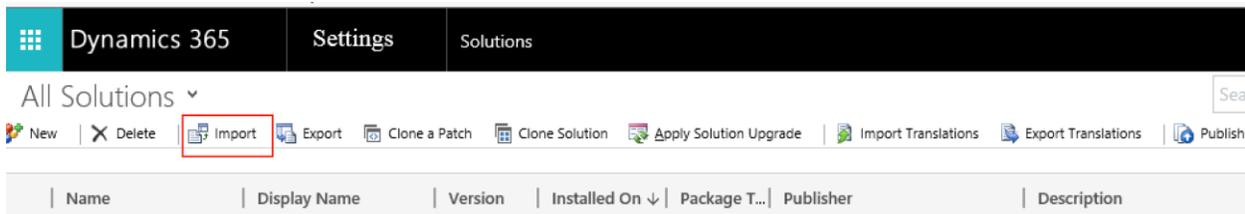
When registered, you can go to <http://www.powerxrm.com/>, select Microsoft CRM AddOns, and choose AddOn you want to download.



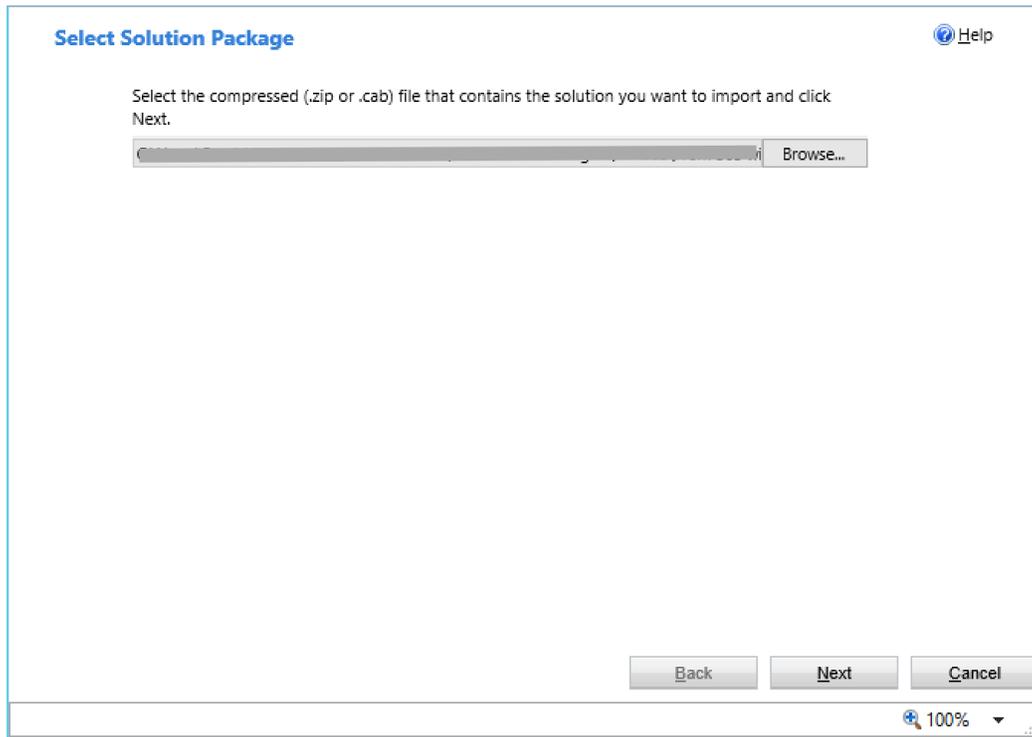
This will take you to the page about selected AddOn where you can read more about it and download it by clicking Free Download and save it somewhere on local computer.

## Import of the solution

Downloaded solution is imported in MS Dynamics CRM, by going to Solutions page. When on Solution page, click Import.

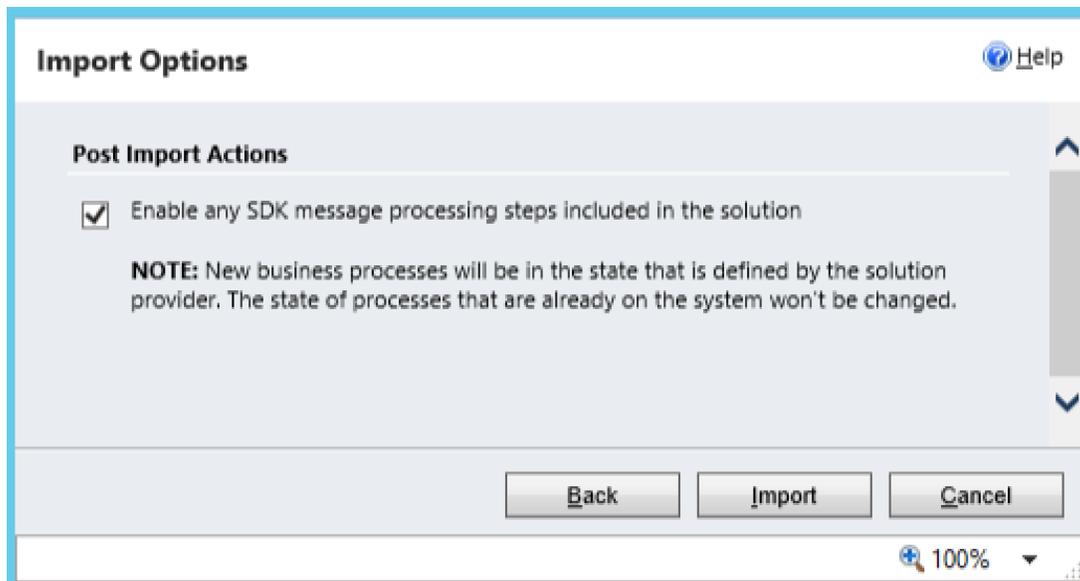


This opens a new form where user locates and selects downloaded zip file for import.



Go next until you reach Import screen.

P.S. Make sure that Enable any SDK message processing steps included in the solution is checked. This is checked by default, and you should leave it checked.





Click import. This starts import process, and when the process is done, a window of confirmation is displayed. Besides message about successful import, there is a list of installed components and status of their import. There is an option to Download Log File at the bottom of the page. Click close, and the import is done and solution is ready to be used.

Date Time ↑	Type	Display Name	Name	Status
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Now, on the solution page, there is a new solution that was just imported.

Name	Display Name	Version	Installed On ↓	Package T...	Publisher	Description
XrmEmailMarketingFree	Xrm.EmailMarketingFree	1.0.0.0	12/18/2017	Managed	PowerXrm by CompuSight	XRM.EmailMarketing is a powerful Email marketi...

In order for all components to be published and ready to be used, you can select newly imported solution and click Publish All Customizations.

Next step in using XRM.EmailMarketing solution is to set configuration in configuration page.

## XRM.EmailMarketing Configuration

Open solution, and go to Configuration.

If you are starting XRM.EmailMarketing solution for the first time (no added configuration), you will get a pop-up message about non-existing configuration. On the displayed tab, there are two fields that need to be filled: username and password. Enter username and password you used to register to PowerXRM page before downloading solution. Insert data and click Verify.

Activation

Checking For Updates...

### PowerXRM Credentials

Username

Password

Verify

If the login is successful, pop-up message will appear.

Next step is to insert API key on Configuration tab.

Activation

Configuration

Your EmailMarketing add-on is up to date!

### Email Provider Info

E-mail provider

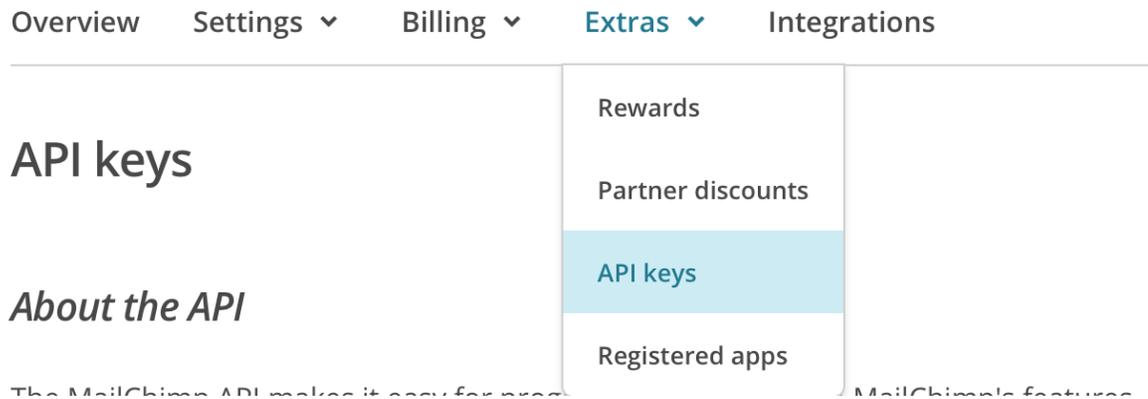
API Key

Verify



Select MailChimp as a E-mail provider and insert API key.

MailChimp API key can be found on Mailchimp site, go to Account/Extras/API keys. If you don't have an API key, you can create one.



Insert data in Configuration tab and click Verify. If the data is valid, you will get a notification about successful configuration. Proceed to the last tab.

Last tab is Defaults and it contains three sections (collapsible buttons):

Campaign defaults – if for some reason your info isn't transferred to MailChimp, this will be the default data for your campaign. Make sure you enter valid info, and fill in all required fields (marked as \*)

Contact Info – contact info for company's contact. Address entered here will be displayed at the bottom of every campaign you send.

Permission reminder – short default description how did your contacts get to your list.

These defaults are required by MailChimp. If you do not provide all info, your campaign sending will fail.