

Microsoft Dynamics® CRM

Dynamics 365

XRM.EmailMarketing Add-On for MailChimp

User Manual

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Solution Introduction

XRM.EmailMarketing is an AddOn for MS Dynamics CRM that helps users send and track Email Campaigns inside their Dynamics CRM, using third party Email Marketing Services, such as MailChimp. XRM.EmailMarketing provides many features that enable integration between Dynamics CRM and MailChimp services. Most of the Campaign preparation is accessible from Dynamics CRM, so that CRM users don't have to do that through their Email Marketing Service provider (such as creating marketing lists, creating campaigns, etc.). CRM users can create contacts, leads, account, marketing lists, and Email campaigns and deploy them to MailChimp provider directly from Dynamics CRM.

Navigating to XRM.EmailMarketing Solution

After the solution is imported into Dynamics CRM and set up to be used by end users as described in the Installation and Configuration guide, CRM users can access [EmailMarketing](#) by selecting the sitemap and displaying the [EmailMarketing](#) solution. Under [EmailMarketing](#) area there are subareas: [EmailMarketing Campaigns](#), [Contacts](#), [Leads](#), [Accounts](#) and [Marketing Lists](#) to open and manage Campaigns and Marketing Lists. Contacts, Leads, Accounts and marketing lists are entities that already exist in Dynamics 365 and any other version of Dynamics CRM.

Navigating to EmailMarketing:

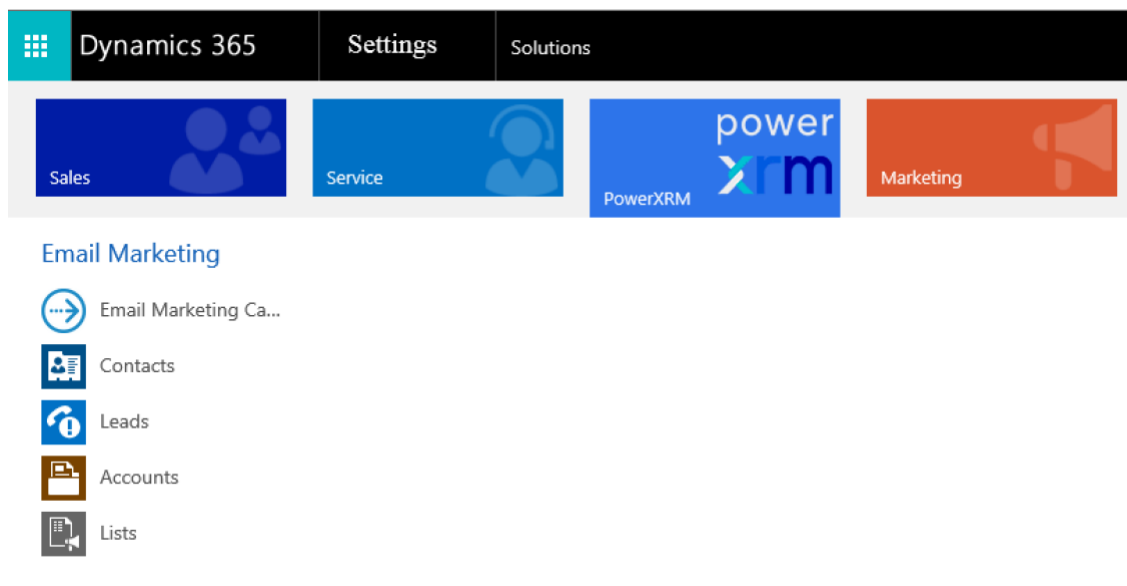


Figure 1: Navigating to EmailMarketing

Contacts, Leads, Accounts, Marketing Lists, and Campaigns

In order to send Email Campaigns from a Dynamics CRM Organization, CRM users must have:

1. Contacts/Leads/Accounts, and Marketing Lists ready, with corresponding Contacts, Leads or Accounts in them. Having the Marketing Lists allows the CRM users to create Email Campaigns that will be sent to preferred Contacts, Leads or Accounts in their Marketing Lists. There is no need to create Marketing Lists on the MailChimp page, since the Marketing Lists and their inherent Contacts/Leads/Accounts are deployed from Dynamics 365 to MailChimp.

Users can navigate to Contacts, Leads, Accounts and Marketing Lists by selecting Marketing area, or PowerXRM area.

Navigating to Contacts, Leads, Accounts and Marketing Lists:

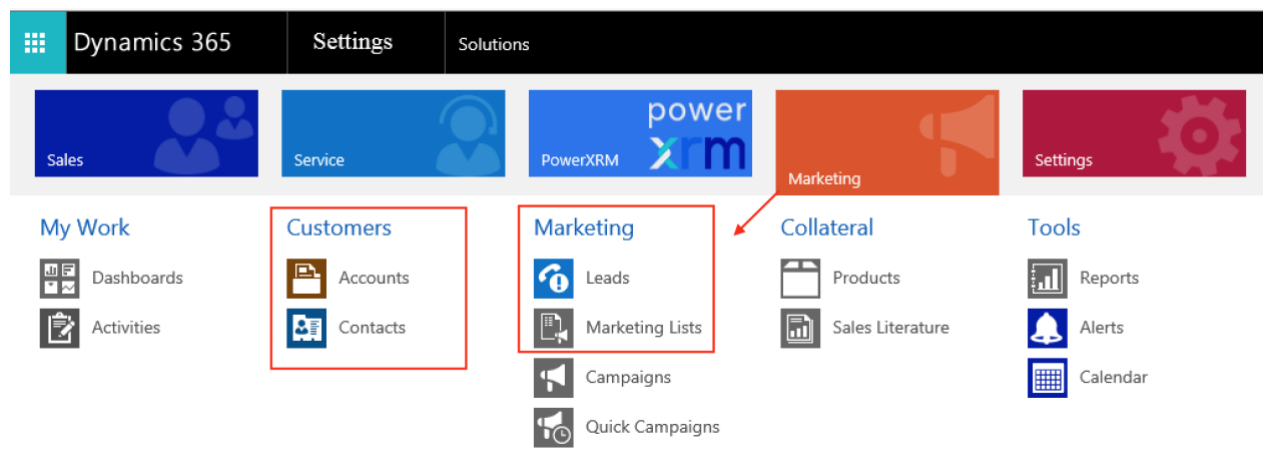


Figure 2: Navigating to Contacts, Leads, Accounts and Marketing Lists

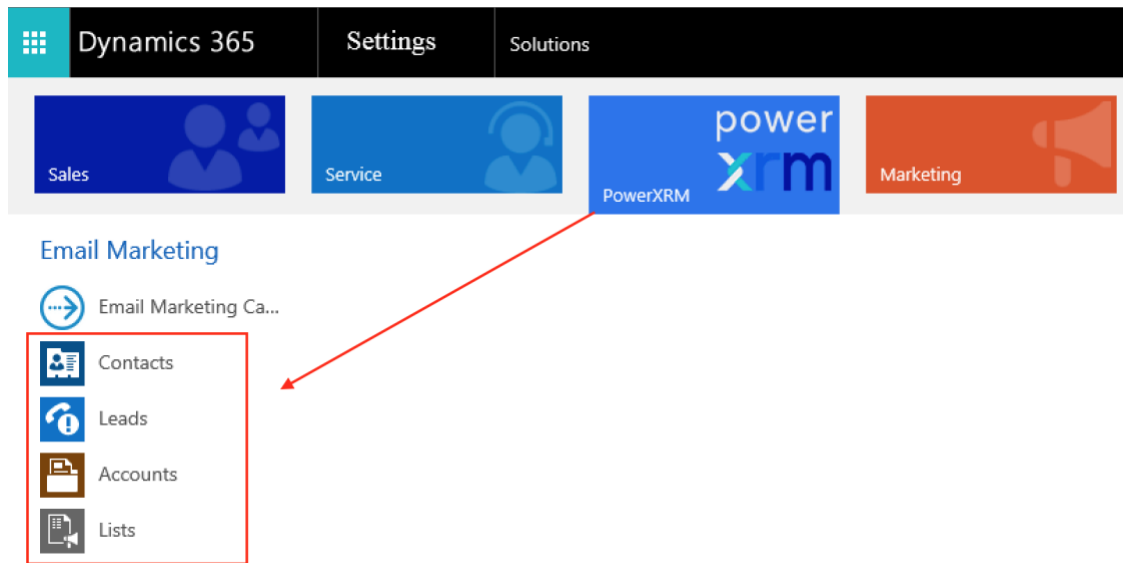


Figure 3: Navigating to Contacts, Leads, Accounts and Marketing Lists via PowerXRM

Contacts

In order to create and send a new Campaign to a list of contacts, the users inside a CRM Organization first have to have Contacts that will be added to the Marketing list. They must have appropriate Email addresses in order to send Campaigns (and first name and last name set).

The screenshot shows the Dynamics 365 'Active Contacts' list. The table has columns for 'Full Name', 'Email', 'Company Name', and 'Business Phone'. The list contains five contacts:

Full Name	Email	Company Name	Business Phone
Adam Smith	asmith@hotmail.com		
Cathryn Janeway	cjaneway@voyager.com		
Jane Smith	jsmith@compusight.c...		
John Doe	jdoe@powerxrm.com		
Larry Jones	ljones@hotmail.com		

Figure 4: List of Active Contacts in Dynamics 365

Leads and Accounts

Marketing lists also can be targeted to leads or accounts, and in that case marketing list will contain list of leads or accounts and information about them, including email which is crucial in sending campaign. In case of accounts, email will first be checked on primary contact for that account. If primary contact

doesn't have an email, email will then be checked on Account entity itself. Same goes for the first and last name.

Marketing Lists

Lists can be targeted to contacts, leads, and accounts. And also, lists can be static and dynamic.

Static lists are predefined lists that contain specific contacts, leads or accounts. In order to change this type of list, specific people need to be removed or added.

Dynamic lists are lists that are changed based on conditions. Example: list can contain only contacts that have @powerxrm.com email addresses. If new contact, lead or account is added to the CRM, and that person also has @powerxrm.com email address, he/she will automatically be included to this list.

Xrm.EmailMarketing Campaigns

Access to Campaigns is easy, by navigating to EmailMarketing area and in the PowerXRM area. If you have other PowerXRM add-ons installed, they would also appear under PowerXRM area, but in different subareas.

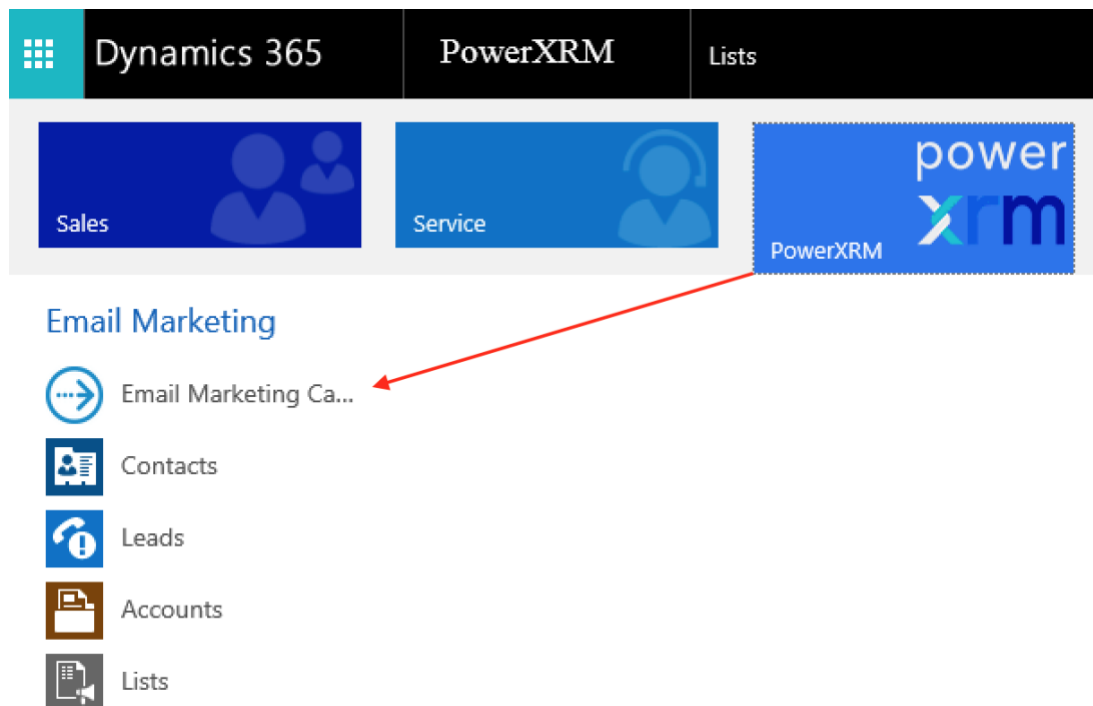
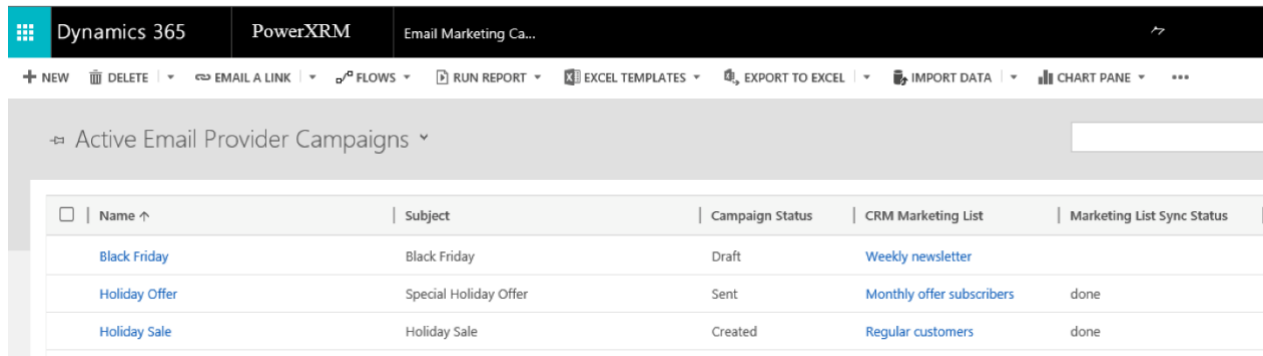


Figure 6: Navigating to EmailMarketing Campaigns

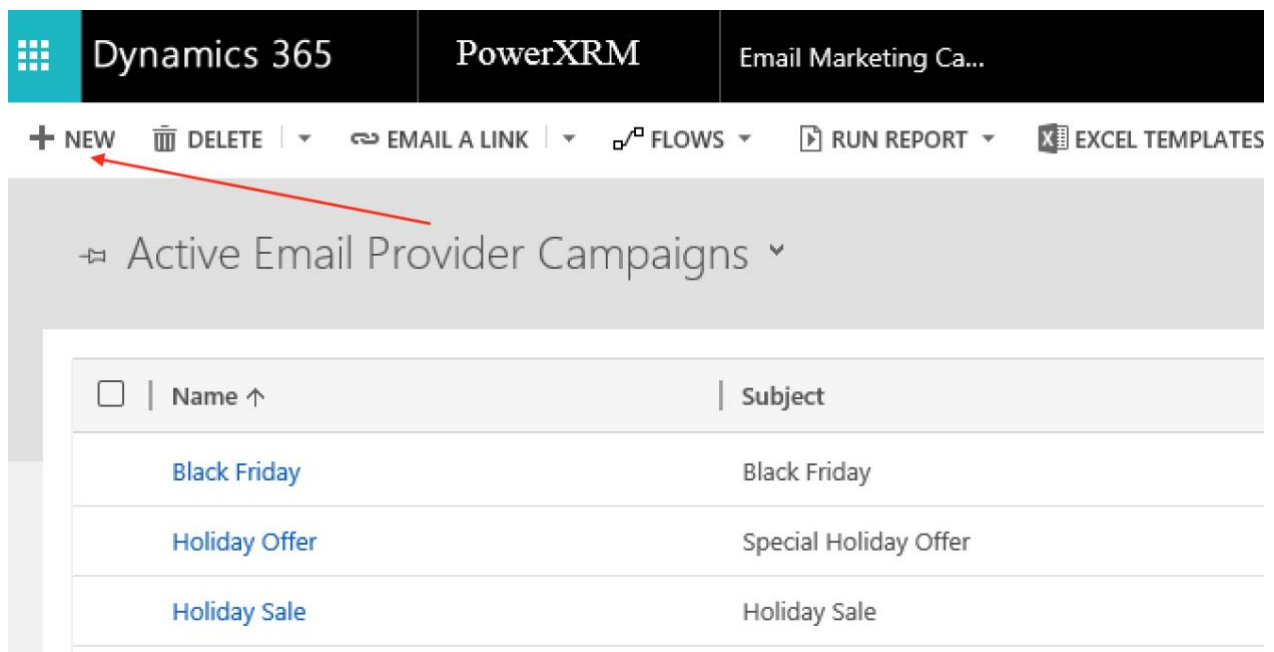


Dynamics 365 PowerXRM Email Marketing Ca...				
+ NEW DELETE EMAIL A LINK FLOWS RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA CHART PANE ...				
Active Email Provider Campaigns				
<input type="checkbox"/> Name ↑	Subject	Campaign Status	CRM Marketing List	Marketing List Sync Status
Black Friday	Black Friday	Draft	Weekly newsletter	
Holiday Offer	Special Holiday Offer	Sent	Monthly offer subscribers	done
Holiday Sale	Holiday Sale	Created	Regular customers	done

Figure 7: List of Campaigns

Creating Campaigns

Select **+NEW** at the top left corner of the form above. New Campaign will be added:



Dynamics 365 PowerXRM Email Marketing Ca...		
+ NEW DELETE EMAIL A LINK FLOWS RUN REPORT EXCEL TEMPLATES		
Active Email Provider Campaigns		
<input type="checkbox"/> Name ↑	Subject	
Black Friday	Black Friday	
Holiday Offer	Special Holiday Offer	
Holiday Sale	Holiday Sale	

Figure 8: Create New campaign

Campaign Input fields:

Figure9: Campaign input fields

1. **Campaign Name** – name of the Campaign (such as Product Launch, Monthly Newsletter, Special offer, etc). This name is shown only in Dynamics 365 and MailChimp Campaigns, but not in the Email messages that recipients get.
2. **Subject** – subject of the Email Campaign, subject that will be displayed in client's inbox.
3. **Sender name** – Name of the Email Campaign sender (such as company name, person name)
4. **Sender email** – Email that will be shown as a sender of Email Campaigns in client's inbox (ex. contact@powerxrm.com). Email domain must be valid/existing, or the Campaign will not be sent (MailChimp does the verification of Email domains and does not allow you to send bulk emails if the Email domain does not exist).
5. **Marketing list** – List of recipients that the campaign will be sent to.
6. **Provider template** – pre-prepared template on MailChimp that will be content of the campaign.
7. **Campaign status** – read-only field that shows the campaign status. Campaign Status can be:
 - **Created** – campaign is created on MailChimp side, but not yet sent.
 - **Sending** – campaign is in the process of being sent from MailChimp.
 - **Sent** – the procedure of sending campaign is completed. At this point, user can't do any changes on the campaign.
8. **Marketing List Sync Status** – progress of transferring your Dynamics CRM list to MailChimp.
9. **Contacts, Leads and Accounts views** – bottom part of the form has three views: Contacts, Leads and Accounts. Information will be filled based on the list used in the campaign. If list is targeted at contacts, then view Contacts will have list of contacts, etc.

10. **Reports Per User** – once campaign is in the Sent status, clicking on Create/Update Campaign will try to sync the campaign statistics and create statistic report for each user

CREATE CAMPAIGN

The screenshot shows the 'New Email Provider Campaign' form in the PowerXRM interface. The form is titled 'EMAIL PROVIDER CAMPAIGN : EMAILMARKETING CAMPAIGN'. Below the title, there is a section for 'New Email Provider Campaign' with a menu icon. The main content area displays a process flow with three stages: 'CAMPAIGN SETUP (Active)', 'MARKETING LIST', and 'READY FOR TRANSFER'. The 'CAMPAIGN SETUP (Active)' stage is currently active and shows a list of fields with their values and status (indicated by green checkmarks and red asterisks for required fields):

Field	Value	Status
* Campaign Name	Holiday Offer	Valid
* Campaign Subject	Special Holiday Offer	Valid
* Sender Name	PowerXRM Team	Valid
* Sender Email	info@powerxrm.com	Valid

At the bottom right of the form, there is a label 'CRM to Mail Provider Transfer preparation process flow' and a 'Next Stage' button with a right arrow icon.

Figure 5: Business process flow for Campaign creation

Campaign creation consists of three business process flow stages:

1. Campaign setup: enter Campaign name, subject, sender name, and sender email, and save it. Saving and having all fields in stage 1 filled will enable to move to the next stage. Go to the next stage – Marketing list.

EMAIL PROVIDER CAMPAIGN : EMAILMARKETING CAMPAIGN

Special Holiday Offer

CAMPAIGN SETUP (Active) → **MARKETING LIST** → **READY FOR TRANSFER**

✓ * Campaign Name Special Holiday Offer ✓ * Sender Email powerxrm@gmail.com

✓ * Campaign Subject Special Holiday Offer

✓ * Sender Name PowerXRM Team

CRM to Mail Provider Transfer preparation process flow **Next Stage** →

2. Marketing list setup: select marketing list to send campaign to

✓ **CAMPAIGN SETUP** → **MARKETING LIST (Active for 1 minute)** → **READY FOR TRANSFER**

✓ * CRM Marketing List Regular customers

CRM to Mail Provider Transfer preparation process flow (Active for 7 minutes) **Next Stage** →

3. Move to the last stage. And finish the process.

Also, **select template** from MailChimp that will be used as campaign content. You need to prepare template content first on MailChimp.

Dynamics 365 | PowerXRM | Email Marketing Ca... | Special Holiday Offer

+ NEW | DEACTIVATE | DELETE | CREATE/UPDATE CAMPA... | PROCESS | ASSIGN | SHARE | EMAIL A LINK | RUN WORKFLOW | ...

EMAIL PROVIDER CAMPAIGN : EMAILMARKETING CAMPAIGN

Special Holiday Offer

✓ **CAMPAIGN SETUP** → ✓ **MARKETING LIST** → ✓ **READY FOR TRANSFER**

✓ * CRM Marketing List Regular customers

CRM to Mail Provider Transfer preparation process flow (Completed in 10 minutes) **Finished** →

* Name Special Holiday Offer

Subject Special Holiday Offer

Sender Name PowerXRM Team

Sender Email powerxrm@gmail.com

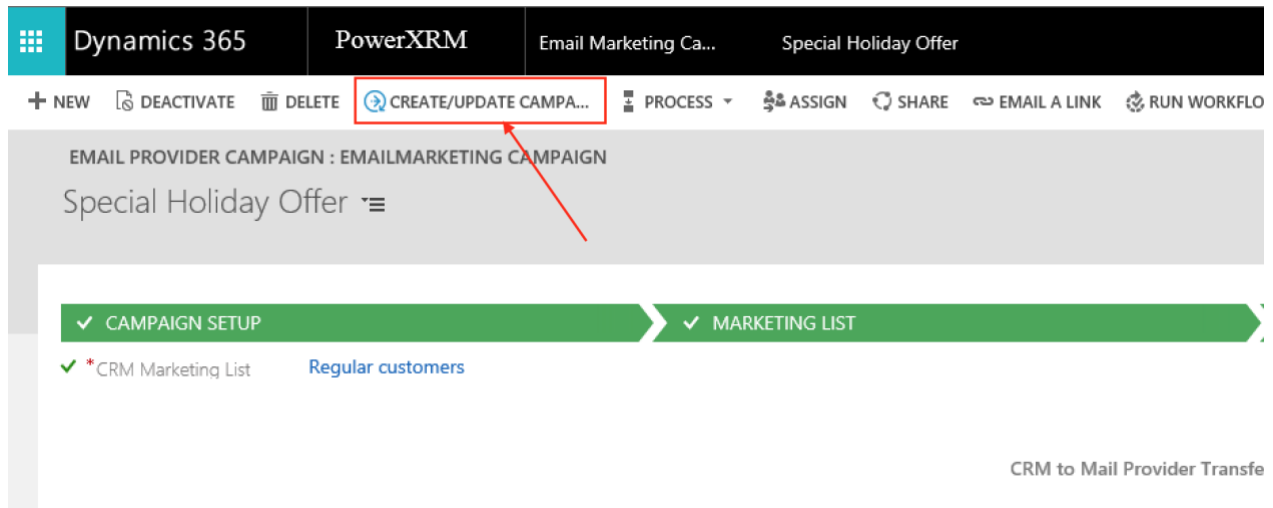
CRM Marketing List Regular customers

Marketing List Sync Status

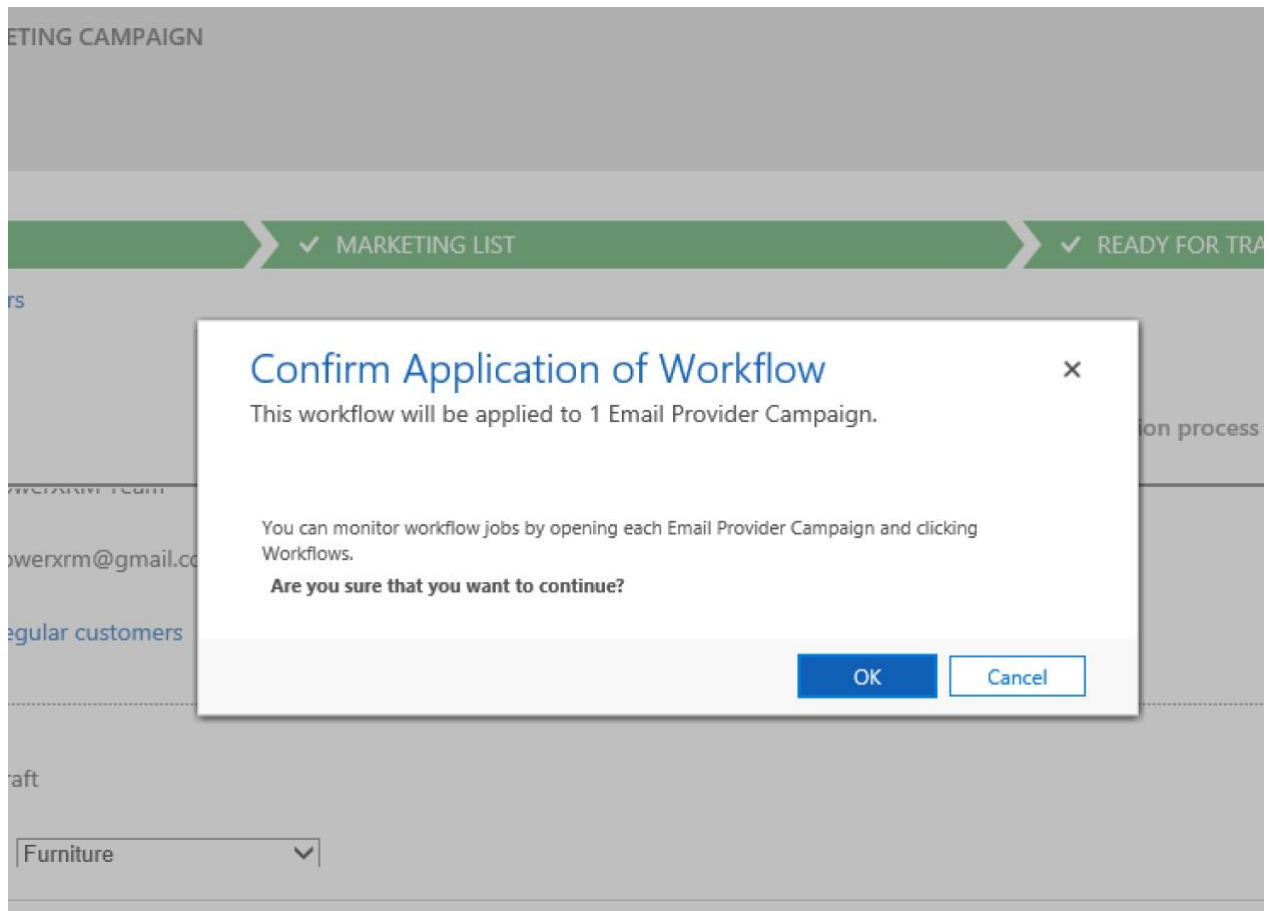
Campaign Status Draft

Provider Template **Furniture**

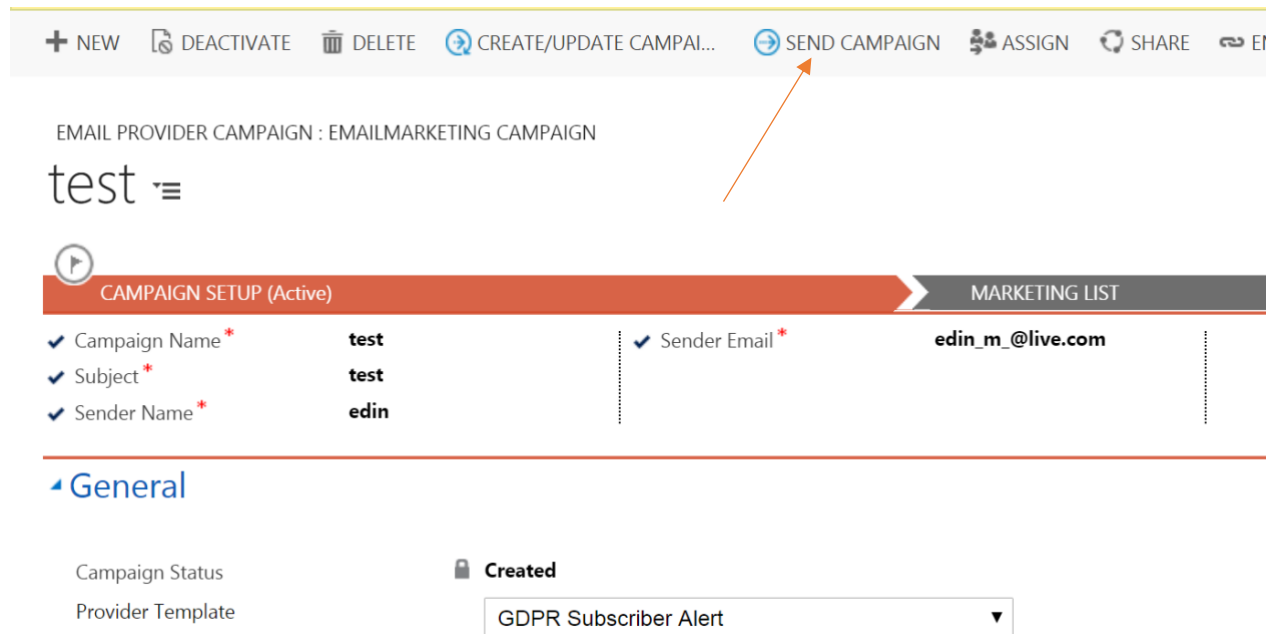
At this point, user is ready to create campaign. Click Create/update campaign button:



This triggers workflow, click OK to confirm.



Dynamics CRM might take some time to pick up the workflow and sync all the members. That can be tracked under Processes, Create Campaign On Mail Provider process more specifically. As soon as all is synced Campaign Status will be changed to Created and Send button will be available.



EMAIL PROVIDER CAMPAIGN : EMAILMARKETING CAMPAIGN

test

CAMPAIGN SETUP (Active) MARKETING LIST

✓ Campaign Name* test

✓ Subject* test

✓ Sender Name* edin

✓ Sender Email* edin_m_@live.com

General

Campaign Status Created

Provider Template GDPR Subscriber Alert

Give it some time, depending on the number of contact in the list. Refresh page to see any changes, like change in Campaign Status or Sync List Progress. Mentioned process list sessions will look like this:

Process: Create Campaign on Email Provider Working on solution: Default Solution

Process Sessions

Common

- Information
- Audit History

Process Sessions

Process Sessions Workflow Job Associated View

Search for records

Process Name	Regarding	Status Reason	Owner	
Create Campaign on Email Provider	Special Holiday	Waiting	Dev Dev	12/18/201
Create Campaign on Email Provider	Holiday Sale	Succeeded	Dev Dev	12/18/201
Create Campaign on Email Provider	Holiday Offer	Succeeded	Dev Dev	12/18/201
Create Campaign on Email Provider	Holiday Offer	Succeeded	Dev Dev	12/18/201
Create Campaign on Email Provider	365	Succeeded	Dev Dev	12/18/201
Create Campaign on Email Provider	365	Succeeded	Dev Dev	12/18/201

1 - 6 of 6 (0 selected) Page 1

Status: Activated

100%

You can close the form, and the process of creating campaign and transferring contacts will continue in the background.

When campaign is started by Create/update campaign button, it will display contacts, leads or accounts from marketing list at the lower part of the screen. Example of list targeted to Contacts is displayed in the next image:

CRM to Mail Provider Transfer preparation process flow (Completed in 4 minutes) ✓ Finished

First Name	Last Name	Email	Job Title	Company Name
Adam	Smith	asmith@hotmail.com		
Cathryn	Janeway	cjaneway@voyager.com		
Jane	Smith	jsmith@compusight.com		
John	Doe	jdoe@powerxrm.com		
Larry	Jones	ljones@hotmail.com		

Before campaign is being sent from MailChimp, it can be changed on CRM side and updated, including Marketing List. In case of changing marketing list, and running Create/update process again, members from previous list would be disassociated from the campaign, and the new ones will be associated (contact, leads or accounts, depending of the selected list. If some of the contacts have some data changed in the meantime (on CRM side), that info will also be updated on MailChimp. If contact had unsubscribed from MailChimp, sending that same contact from CRM to MailChimp won't change their stats, they'll still be unsubscribed and won't receive campaigns.

When campaign status changes to Created, it means that the campaign is created on MailChimp side.

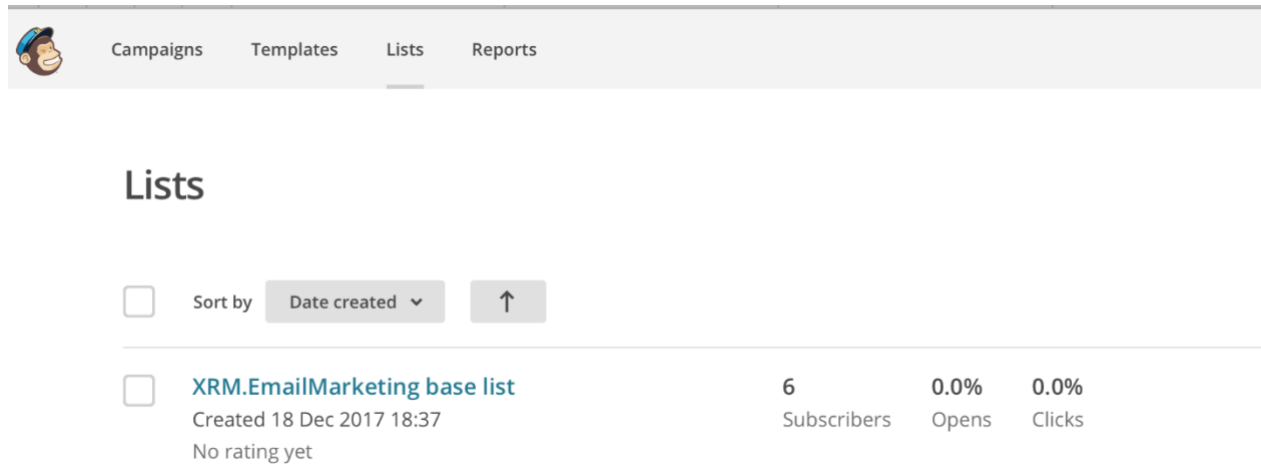
Sync List status changed to Done means that all contacts from the list have been transferred to MailChimp.

Campaign can be changed and updated until has status Sent. When campaign is sent from MailChimp, Create/update campaign process can be started again on Dynamics CRM side to update campaign status, and lock all the fields on the campaign.

Continuing process on MailChimp side.

Lists:

When user creates and sends first campaign from Dynamics XrmEmailMarketing add-on to MailChimp, this will create base/master list on MailChimp called **XRM.EmailMarketing Base List**. All contacts from that campaign will go to that list.

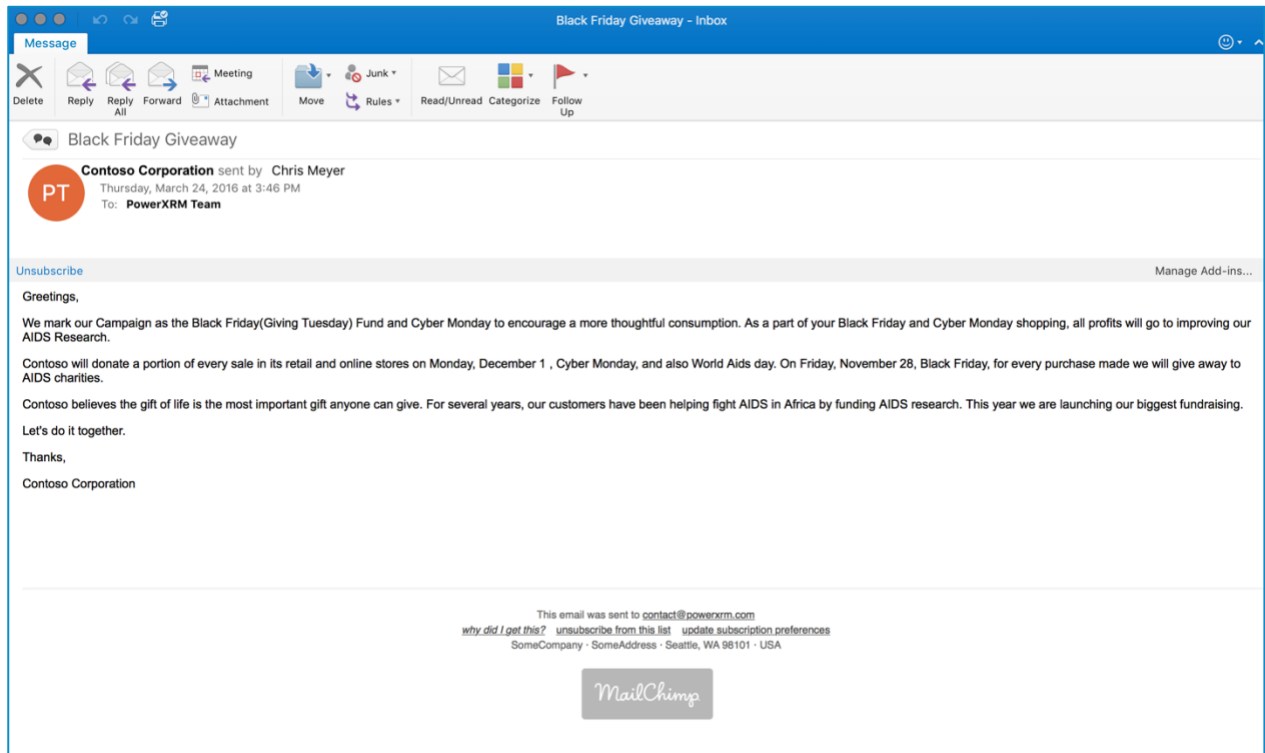


	Subscribers	Opens	Clicks
<input type="checkbox"/> XRM.EmailMarketing base list Created 18 Dec 2017 18:37 No rating yet	6	0.0%	0.0%

All future contacts will be added to this list. Existing contacts will be updated if there are some changes on Dynamics 365 side.

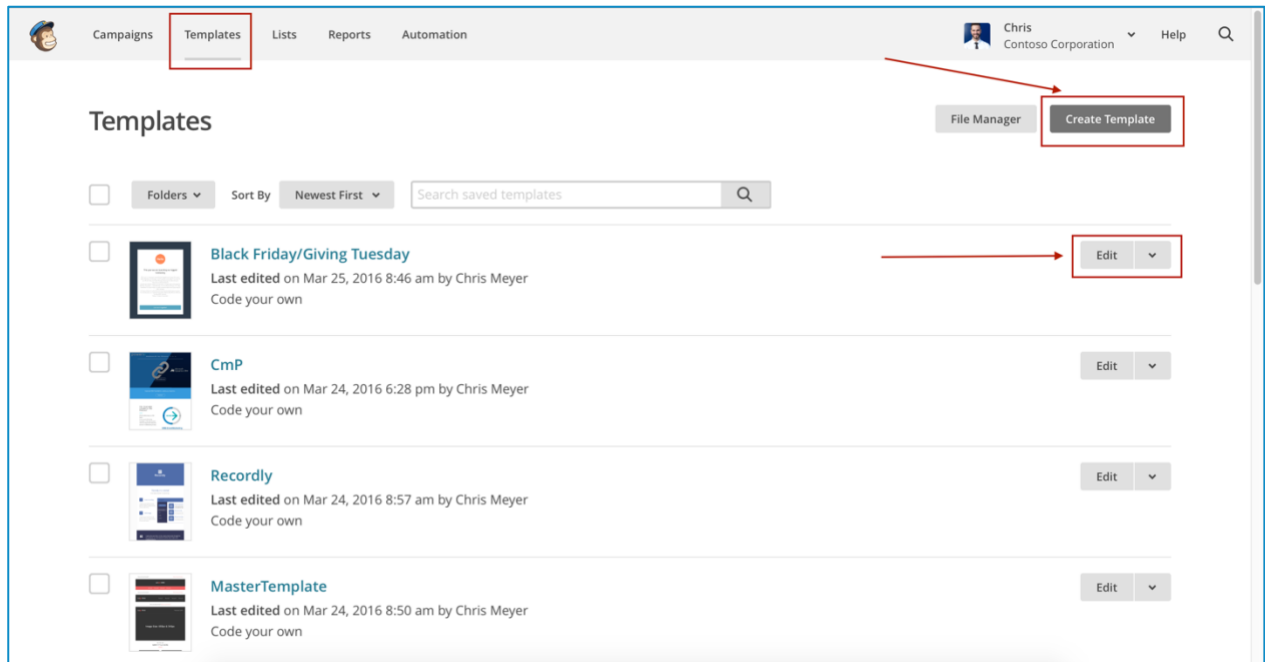
Every campaign will create new segment in list. Every segment will contain contacts from Marketing List selected on Dynamics CRM side. So, you will be sending campaign to segment. Base list will contain all contacts from all segments. One contact can be in multiple segments, but it will be once in the list. So, number of members in the list is sum of individual contacts/leads/accounts.

In the receiver's inbox, Email Campaign sent and completed, looks like below:



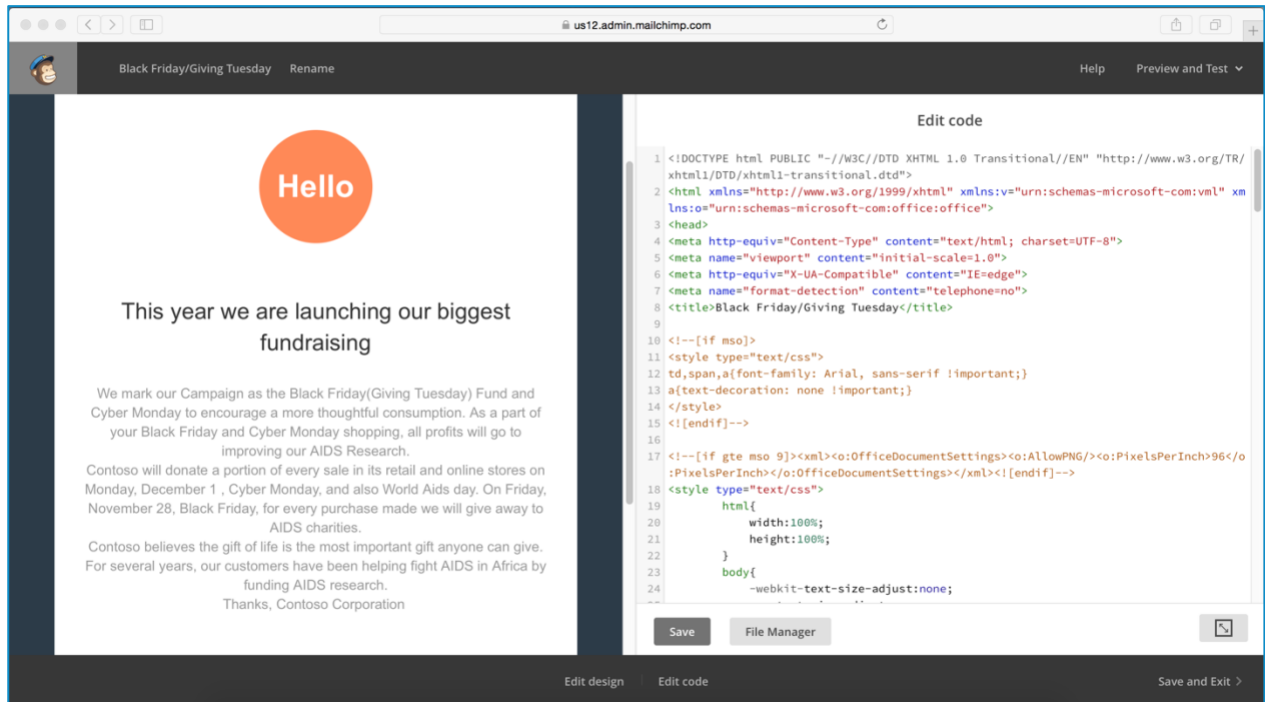
Preparing templates in MailChimp

Go to the Mailchimp site, and open Templates menu. You can add new Templates or edit any of them previously added.



You can create a new Template and code your HTML or copy it from another source. When you have the Template that you want to edit, go to Edit option next to the desired template, as displayed on the image above.

Edit mode of the MailChimp template:

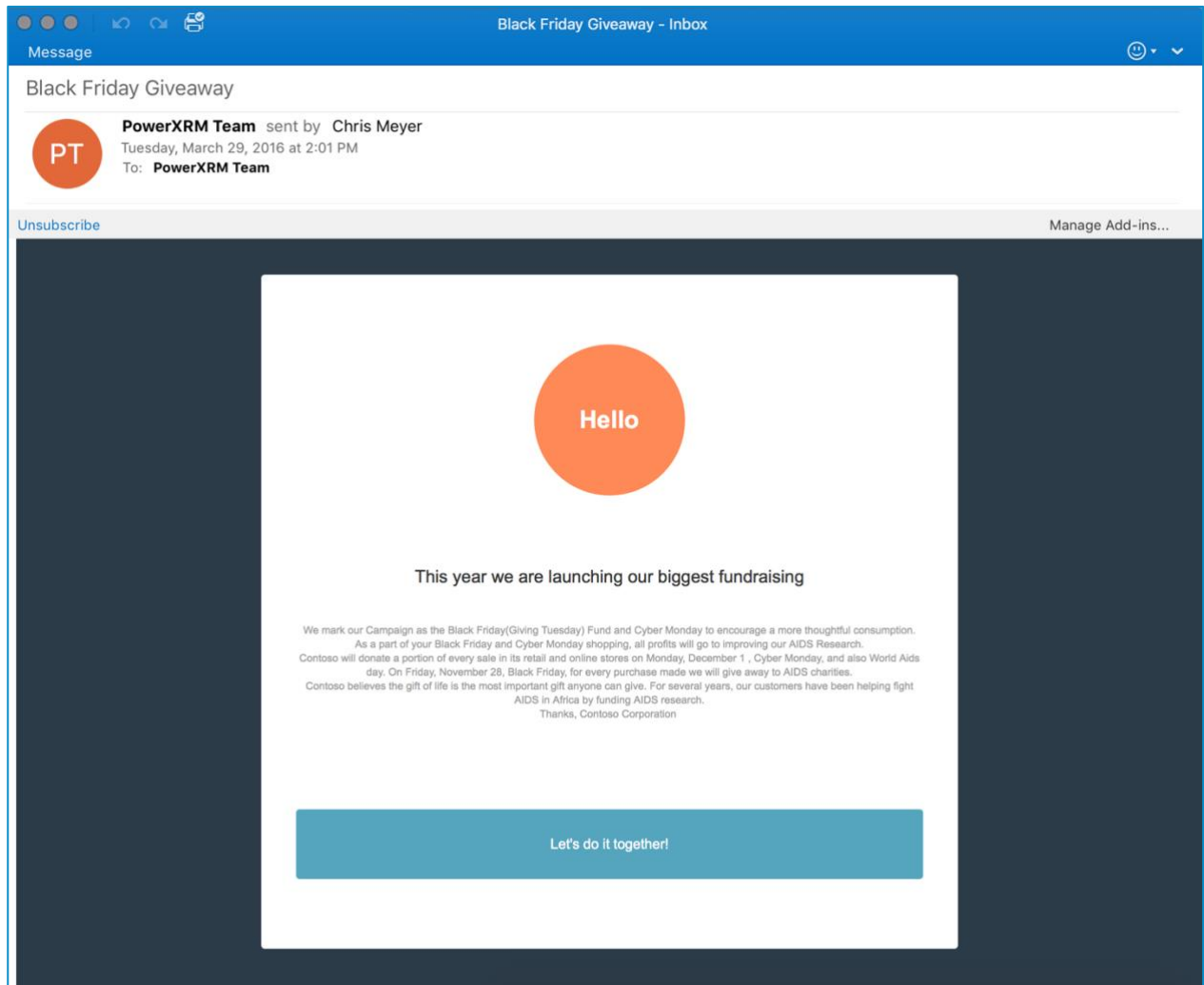


Note: MailChimp does not allow you to use placeholders in templates they provide. It is mandatory for you to replace entire placeholder text on the left side with your own, otherwise MailChimp will not allow you to activate campaign and Xrm.EmailMarketing will give you message explaining what is problem

with your Campaign: “ERROR – Default text content: Please fill in your content. We noticed a placeholder text in one of your message blocks.”

On the right side you have your HTML and on the left side you can see the result of your HTML. When done editing, click Save and exit on the bottom right corner. And now you can select this Template when creating Campaigns in CRM.

In the receiver’s inbox, Email Campaign sent and completed, looks like below:



MailChimp Campaigns

In MailChimp, the Sent Campaign looks like this:

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Black Friday Giveaway	Regular · Promotion Update List	2	50.0%	0.0%	View Report
			Sent on Thu, Mar 24, 2016 10:46 am	Subscribers	Opens	Clicks	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Weekly Newsletter	Regular · Contest marketing list	1	1	0	View Report
			Sent on Wed, Mar 23, 2016 10:02 am	Subscribers	Opens	Clicks	
<input type="checkbox"/>	<input type="checkbox"/>	PowerXRM Download	Regular · Contest marketing list				Edit
			Edited on Mar 04, 2016 4:42 am by you				
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PowerXRM Blog Newsletter	RSS-Driven · CompuSight TradeShow Marketing List				Sent Campaigns
			Last sent on Mar 03, 2016 11:02 am				
			Sends every day at 11AM when new posts are added				

Black Friday Giveaway [View Report](#)

[Campaign Preview](#) [HTML Source](#) [Plain-Text Email](#) [Details](#)

Greetings,

We mark our Campaign as the Black Friday(Giving Tuesday) Fund and Cyber Monday to encourage a more thoughtful consumption. As a part of your Black Friday and Cyber Monday shopping, all profits will go to improving our AIDS Research. >

Contoso will donate a portion of every sale in its retail and online stores on Monday, December 1 , Cyber Monday, and also World Aids day. On Friday, November 28, Black Friday, for every purchase made we will give away to AIDS charities.

Contoso believes the gift of life is the most important gift anyone can give. For several years, our customers have been helping fight AIDS in Africa by funding AIDS research. This year we are launching our biggest fundraising.

Let's do it together.

Thanks,

Contoso Corporation

This email was sent to [sc_Test.Email.Address.20](#)
[why did I get this?](#) [unsubscribe from this list](#) [update subscription preferences](#)
SomeCompany - SomeAddress - Seattle, WA 98101 - USA

MailChimp

Statistics can also be seen on the Campaign page on the MailChimp (opens, clicks, subscribers).

[Campaigns](#)
[Templates](#)
[Lists](#)
[Reports](#)
[Automation](#)

Chris
 Contoso Corporation

[Help](#)

Campaigns

Create Campaign

Download Sent Campaigns

☐

Folders

Filter

<input type="checkbox"/>	<div> <div>Black Friday Giveaway</div> <div>Regular · Promotion Update List</div> <div>Sent on Thu, Mar 24, 2016 10:46 am</div> </div>	<div>2</div> <div>Subscribers</div>	<div>50.0%</div> <div>Opens</div>	<div>0.0%</div> <div>Clicks</div>	<div>View Report</div>
<input type="checkbox"/>	<div> <div>Weekly Newsletter</div> <div>Regular · Contest marketing list</div> <div>Sent on Wed, Mar 23, 2016 10:02 am</div> </div>	<div>1</div> <div>Subscribers</div>	<div>1</div> <div>Opens</div>	<div>0</div> <div>Clicks</div>	<div>View Report</div>

Contact PowerXRM at:

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contact@powerxrm.com