SYSFORE PROMOT
365

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Welcome

Welcome to this companion guide for MS Dynamics 365 Contacts/Leads synchronization to MailChimp. Within this guide, you'll be shown how to use Sysfore PROMOT 365 App in MS D365 instance.

About Sysfore

Sysfore is the first Microsoft Gold Partner on Azure and one of the early AWS certified partners in India, with a dedicated focus on modern apps and cloud managed services. With rich breadth and depth of experience and expertise in enabling customers onto the cloud-based offerings, Sysfore has delivered over 100's of engagements for customers to ensure their success. Sysfore's strong product engineering team focus on developing dynamically scalable cloud-ready web and mobile apps. Sysfore Cloud Managed Services offers 24*7 support services for subscribed customers, for managing their various cloud infrastructure. Sysfore uses Microsoft Dynamics 365 to help customers grow their business multi-fold by effectively positioning their offerings coupled with the right value.

For more information visit :
https://bit.ly/2Mgnxsl

Introduction

This App is used for syncing newly created and updated MS D365 Contacts/Leads to MailChimp List with the scheduling process. Immediate sync of D365 Contacts/Leads can occur during the action of Sync to MailChimp in each record-wise.

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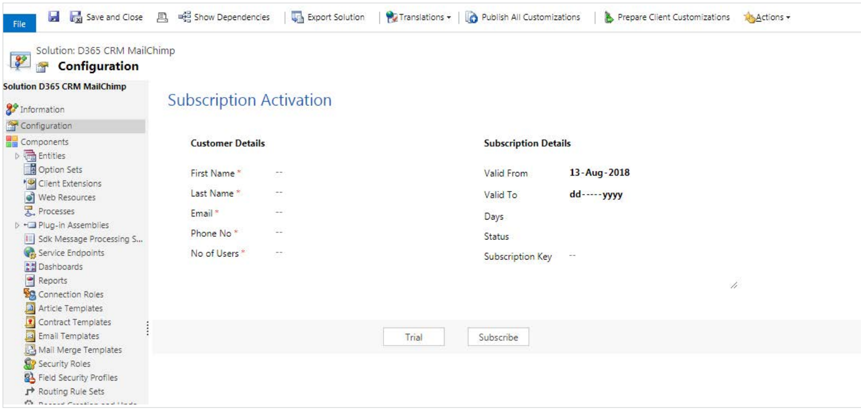
4. Subscription Activation

Subscription activation is available in D365 configuration page. Two types of activations are available. They are Trial and Subscribe.

Below screenshot describes about subscription activation.



4.1 Field Explanation

Customer Information	:	First Name, Last Name, Email and Phone No.
No of Users	:	The total number of users who are accessing immediate sync process
Valid From and To	:	Between "from" and "to" date, the license validity will be available.
Days	:	Total number of license validity days
Status	:	There are 3 types of License Status. Below is the explanation about status.
1. Pending	:	During Subscribe and Renewal activation request, the status will be pending.
2. Activated	:	Once the license is activated, the status will be activated. It means that the sync process can be able to access.
3. Expired	:	License validity expiry status.
Subscription Key	:	Subscribe or renewal activation key must be pasted here for the activation process.
Process Buttons	:	There are 4 types of process buttons. Below is the explanation of process.
1. Trial	:	30 days validity from "valid from" date.
2. Subscribe	:	Default 1 year validity from "valid from" date. Otherwise request for particular date range.
3. Renewal	:	Once the validity expires, customer can request for renewing the license.
4. Activation Key	:	Once the license is activated, the activation key will be sent to the customer mail Id. This key should be pasted to the subscription key field and activate the license.

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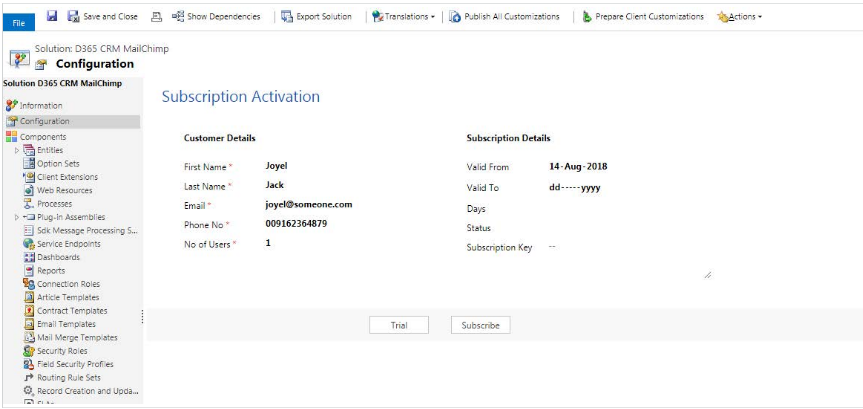
4.2 License Activation Steps

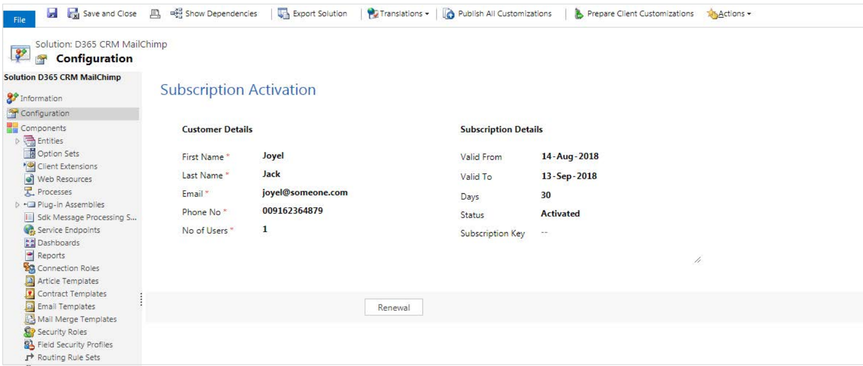
4.2.1 Trial Activation

Customer details are required for license activation. Default valid from is current date . The customer can change the valid from date. When processing trial action, valid to, number of days and status will be automatically displayed.

Below Screenshot explains about Trial activation.

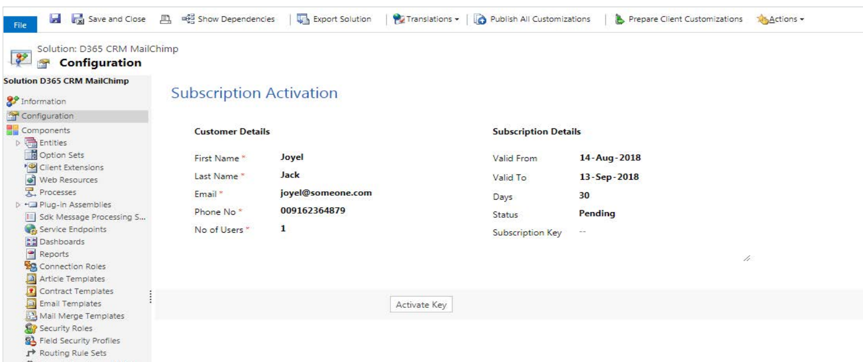


The above data is enough for trial activation. Once the Trial is activated, the data will be as shown below.



4.2.2 Subscribe Activation

Subscribe activation can occur in two ways. Before Trial, one can directly activate the Subscription or in case of expiry of Trial license expired, subscription can be done. Below screenshot describes about this.



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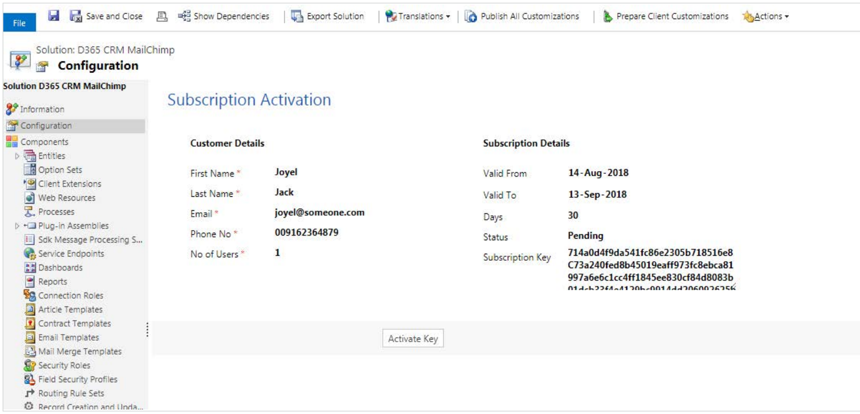
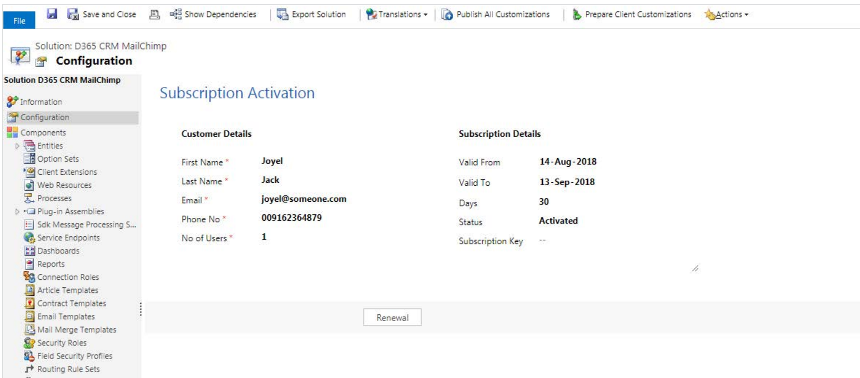
If Valid To is not defined, default 1-year license will be activated. Otherwise, depending upon the selected Valid To the validity day will be calculated and status will be as Pending.

The request will go to Sysfore Apps Team and once the license is activated, the subscription key will be sent to the customer mail. The customer can use the subscription key and activate the license.

Below screenshot explains about activation of license by using subscription key.



After activated the license, the data will be as shown below. The status will be changed as activated. If the key is not proper or in case of any other issue, the status will be as pending only.



4.2.3 Renewal Activation

The customer can select the Valid From and Valid To and request for Renewal activation. The request will be pending status. The request will go to Sysfore Apps Team. The customer will get license key through mail for activating the license.

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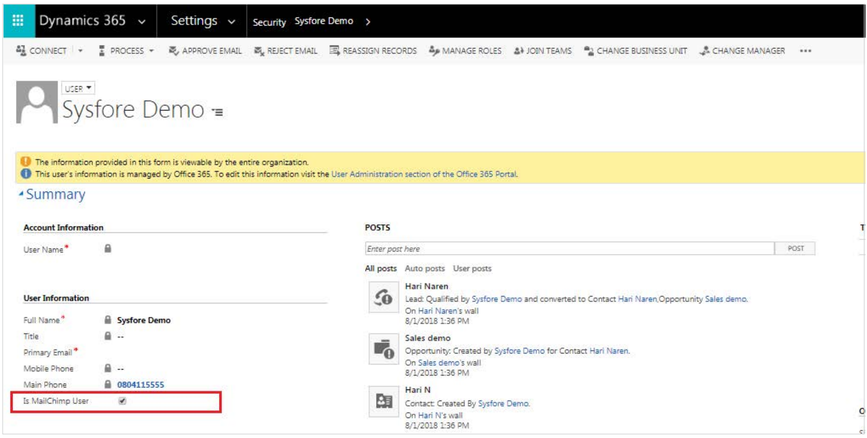
5. MailChimp User Definition

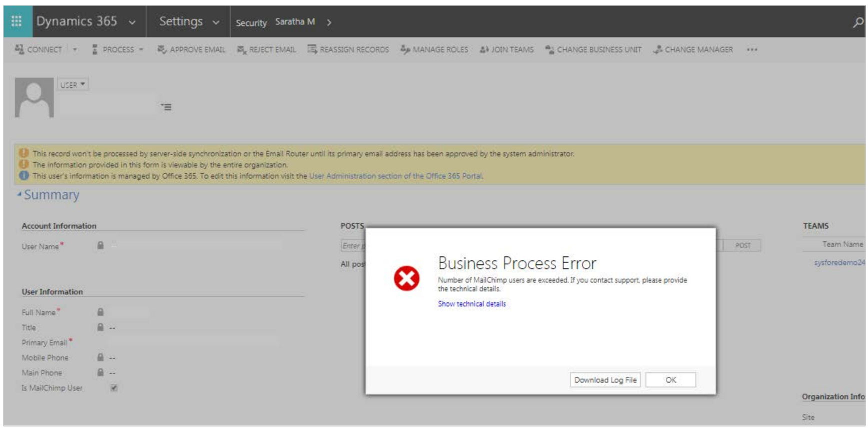
Immediate sync process can access by the user who is MailChimp user. MailChimp user can be defined in User entity. In user information section, "Is MailChimp User" check box has to be true if the user is MailChimp user.

Below screenshot describes the definition of MailChimp User.



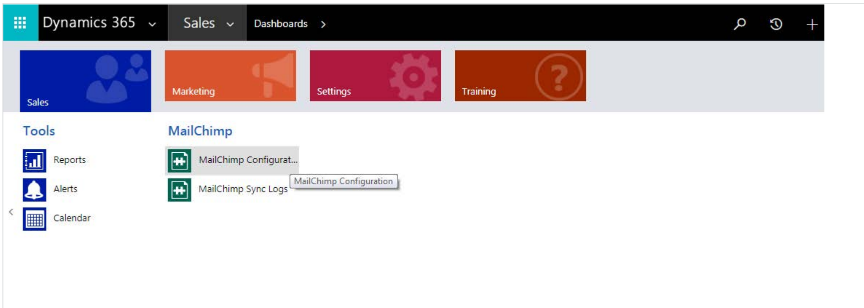
5.1 MailChimp User limit Notification

During License activation, the number of user access for sync process can be defined. More than the limit crossed the notification will be as shown as below.



6. Custom Entities

Sysfore MailChimp App contains two record types. They are MailChimp Configuration and MailChimp Sync Logs. Those are included in the Sales App.



MailChimp Configuration settings contains MailChimp credentials, account communication details and campaign details. Sync Scheduling can be started/stopped here. It explains sync starting time, next execution time and the status of sync.

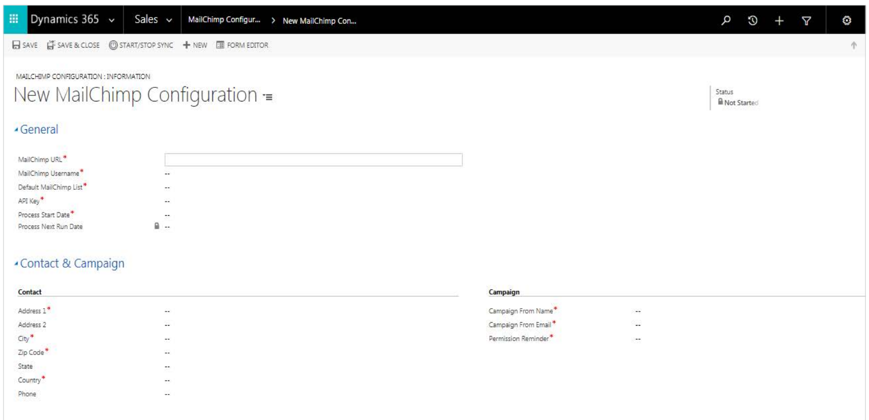
MailChimp Sync Logs describes about the status (Success/Error), sync completed time and the error log if any discontinuation happens during sync.

Response log explains about the error details. In case of success, it gives the details of the number of Contacts/Leads Created/Updated.

7. Configuration Settings

Configuration settings contains the following details.

- MailChimp account credentials
- Account address details
- Campaign details

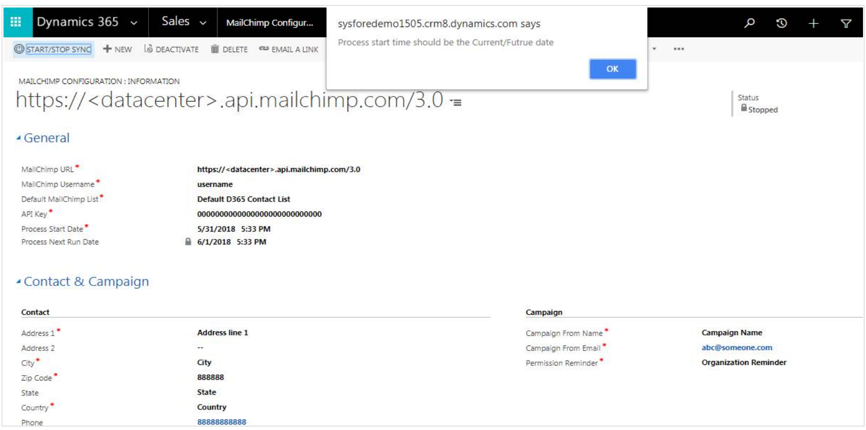


7.1 Settings Field Explanation

MailChimp URL	:	Each MailChimp account has a URL with data center. The URL has to be entered here which is used for syncing to the particular data center. For e.g., the URL should be like this. https://<datacenter>.api.mailchimp.com/3.0
MailChimp Username	:	Login username of Mailchimp.
Default MailChimp List	:	The name of MailChimp list. Under this list only all MS D365 Contacts/Leads push to MailChimp
API Key	:	MailChimp account key
Process Start Date	:	The starting time of Scheduling process. This should be the current/future date and time.
Process Next Run Date	:	1 day difference between previous schedule process ran.
Contact Section	:	MailChimp account communication address.
Campaign Section	:	If any mail sent using the campaign, it will retrieve the name, mail and account related information from this campaign details.
Status	:	Default status is Not Started. Otherwise it will be Started/Stopped.
Ribbon Button	:	START/STOP SYNC is used for starting/stopping the scheduling process

7.2 Sync Start Notification

START/STOP SYNC ribbon button is used to start or stop the synchronization from MS D365 to MailChimp. The process start date should be the current / future date and time. Once started, the process will execute the time which is defined in the process start date. Each schedule process execution time, the next process execution time will be displayed in the next process run date. The scheduled time is one day between the two execution time.



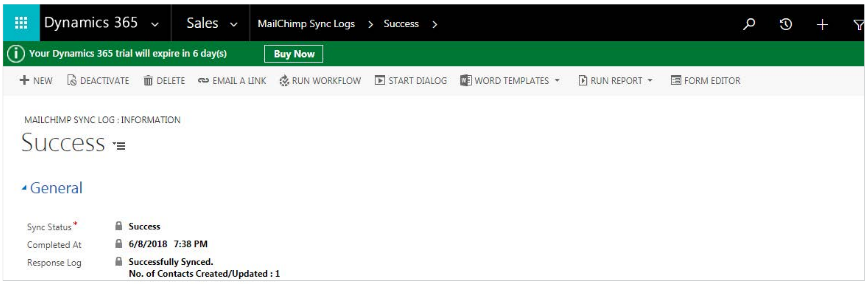
8. MailChimp Sync Logs

Sync Logs describes about the status of sync (Success/Error), sync completed time and the response log details. It will register the log in every sync execution except if there are no Contacts/Leads for sync.

Success Sync : If one or more Contacts or Leads are synced, it should display the success message with the details of total number of contact or leads synced.

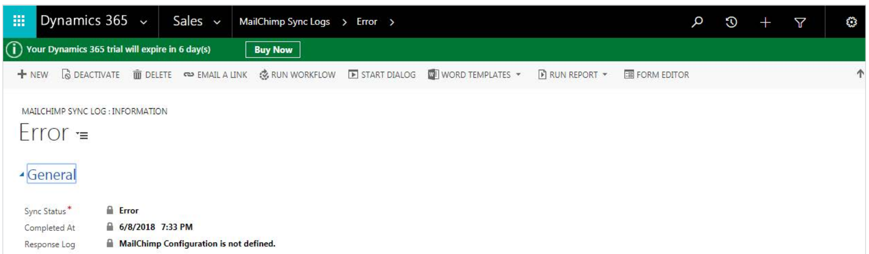
Message as follows :

Successfully Synced.
No. of Contacts Created/Updated : <Total Number of contacts>
No. of Leads Created/Updated : <Total Number of leads>



Error Sync : If MailChimp Configuration details are missing or any exception occurs during sync execution, the error log will be registered.

Plug-In Trace Log : Enable the Plug-In trace log in MS D365. It will describe the details of execution and where the sync failed.



8.1 Log Field Explanation.

Sync Status : Success/Error.

Completed at : Sync Completed Time.

Response Log : If success, the log is Successfully Synced. Otherwise, the reason for termination of sync will be recorded in the response log.

9. Contact/Lead Sync

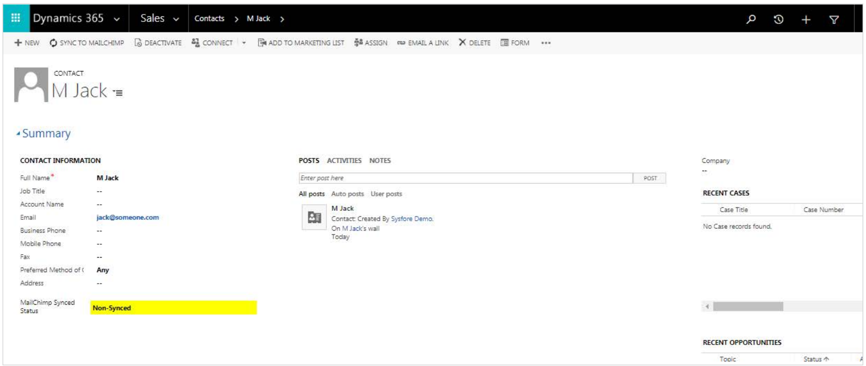
Newly created/Updated Contact/Lead can be synced immediately or through scheduled process. The “SYNC TO MAILCHIMP” ribbon button added in Contact and Lead record is used to immediately sync to MailChimp. The field of “MailChimp Synced Status” shows the status of sync.

Each Contact and Lead synced to MailChimp as a subscriber under the MailChimp list which is defined in MailChimp Configuration settings. Name and Mail address details of every contact and lead will be synced to MailChimp list. Once contact/lead is synced the “SYNC TO MAILCHIMP” button will be hidden. If any Name and Mail modification occurs in the MS D365, the “SYNC TO MAILCHIMP” will be displayed to update the respective changes in MailChimp.

Note : Mail address is mandatory for MailChimp. The record which is not having the mail address won’t sync to MailChimp.

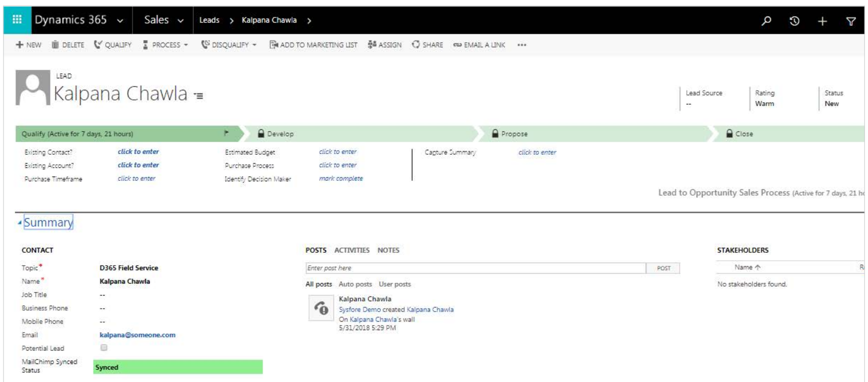
9.1 Non Synced Contact/Lead

Newly created Contact/Lead in Dynamics 365 lead and contact entity records will be shown the status as “Non-Synced” as shown in the below screenshot.



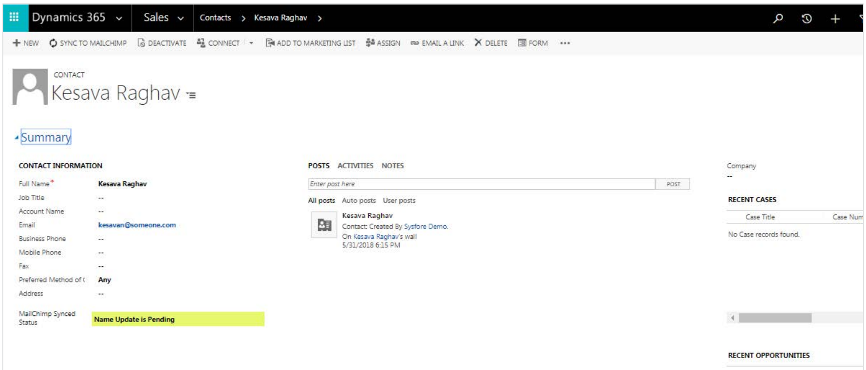
9.2 Synced Contact/Lead

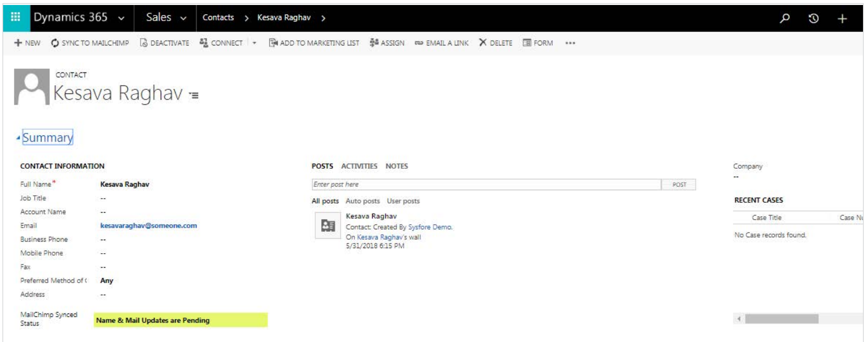
The status will be shown as “Synced” for all the MS D365 Contacts/Leads synced to MailChimp.



9.3 Modified Contacts/Leads

In case of any modifications in the name/mail of MS D365 Contacts/Leads, depending upon the changes the status will be as shown in the below screenshot.





10. Contact us for support

IFor any further assistance or enquiries, please contact us at:

Sysfore Technologies Pvt. Ltd
No. 13 (117-120) First Floor
Green Leaf Layout, 80 Feet Road
Koramangala 4th Block
Bangalore – 560 034

E-mail : D365Support@sysfore.com
www.sysfore.com

SYSFORE TECHNOLOGIES PVT LTD
No. 13 (117-120) First Floor, Green Leaf Layout, 80 Feet Road, Koramangala
4th Block, Bangalore – 560 034. Tel: +91-80-4110 5555