

BizMailChimp

MailChimp & Dynamics CRM Integration Tool Installation Guide

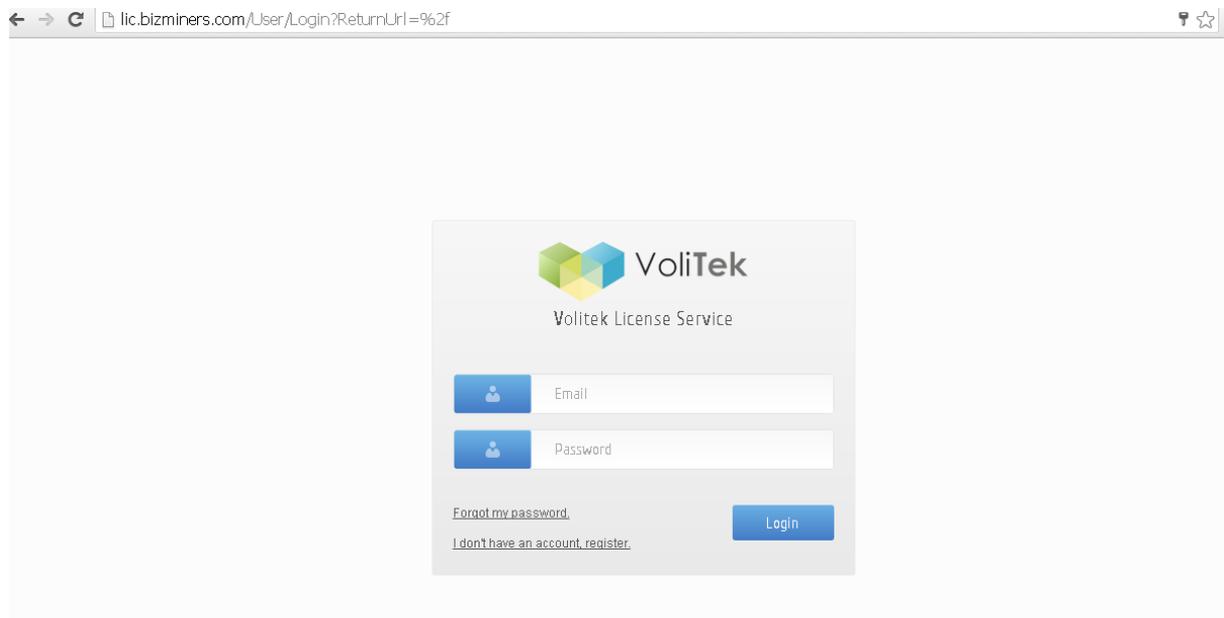
Introduction

This document outlines the components and controls that are available to integrate Dynamics CRM and MailChimp. BizMailChimp provides an easy way to use interface for applying the different methods for Email Marketing in Dynamics CRM. In addition, BizMailChimp provides a quick way to start leveraging data between Dynamics CRM and E-Mail Statuses and Results.

BizMailChimp requires .Net 4.5 We assume your server, where BizMailChimp runs, is connected to the web. Please backup your crm customizations files before starting installation.

1. Register for License and Create Connection

- Visit <http://lic.bizminers.com> to register for trial or paid license. If you never registered before, complete the registration form and activate by clicking confirmation email which sent you by Volitek Solutions.



lic.bizminers.com/user/register

Welcome VoliTek Admin | **Logout** | License Service

Register for License

Register for License

First Name:

Last Name:

Company Name:

Email:

Password:

Password(again):

[Privacy & Terms](#)

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If you already registered before, you can login and create connections.
 After login, click Connections button and click "Add New Connection" button to create new connection.

lic.bizminers.com

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[Connections](#)
[Update Your Profile](#)

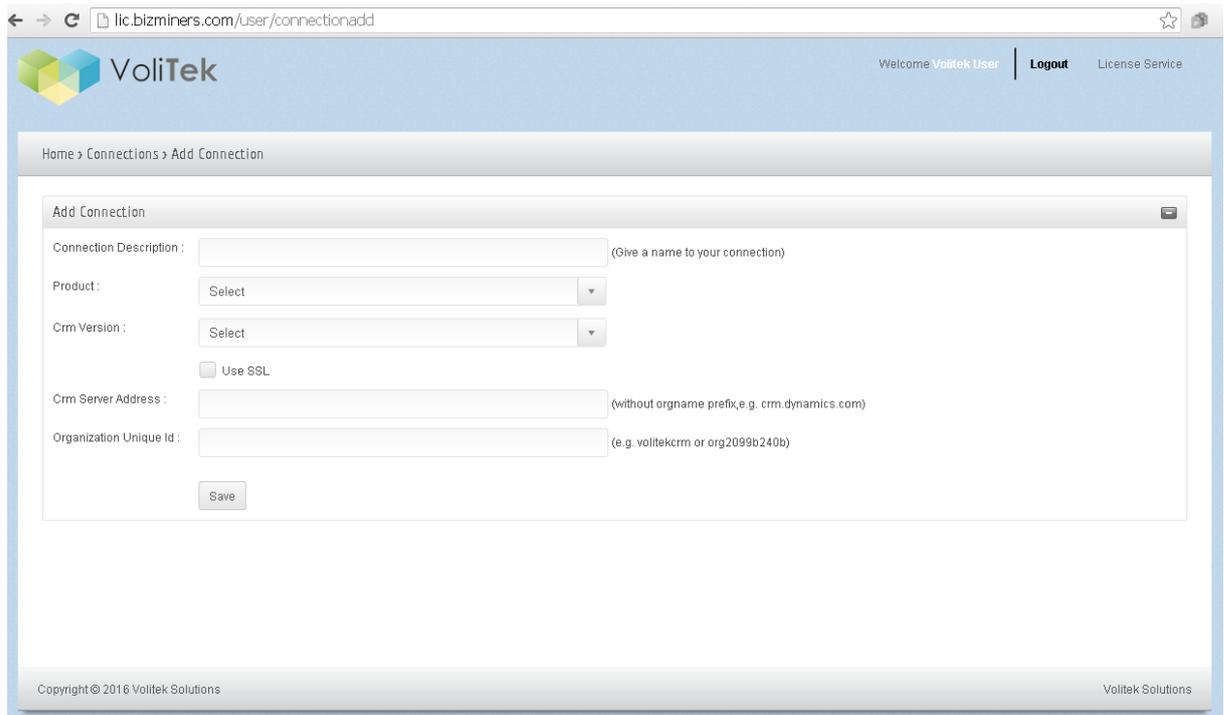
lic.bizminers.com/User/connectionlist

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Home > Connections

20 Rows Search:

Connection Name	Product Name	Activate Date	Expire Date	CrM Version	CrM Server	CrM Organization Unique Id	Use SSL	Active	License Model	
bm for demo update	MailChimp Dynamics CRM Integration Tool	03.03.2012 00:00:00	13.03.2050 00:00:00	2011	crmist.net:5555	bm	No	Yes	LifeTime	Edit
crm2013_bm	MailChimp Dynamics CRM Integration Tool	02.03.2015 00:00:00	02.03.2100 00:00:00	2011	crmist-ns:5555	bm	No	Yes	LifeTime	Edit



lic.bizminers.com/user/connectionadd

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Home > Connections > Add Connection

Add Connection

Connection Description : (Give a name to your connection)

Product :

Crm Version :

Use SSL

Crm Server Address : (without orgname prefix,e.g. crm.dynamics.com)

Organization Unique Id : (e.g. volitekcrm or org2099b240b)

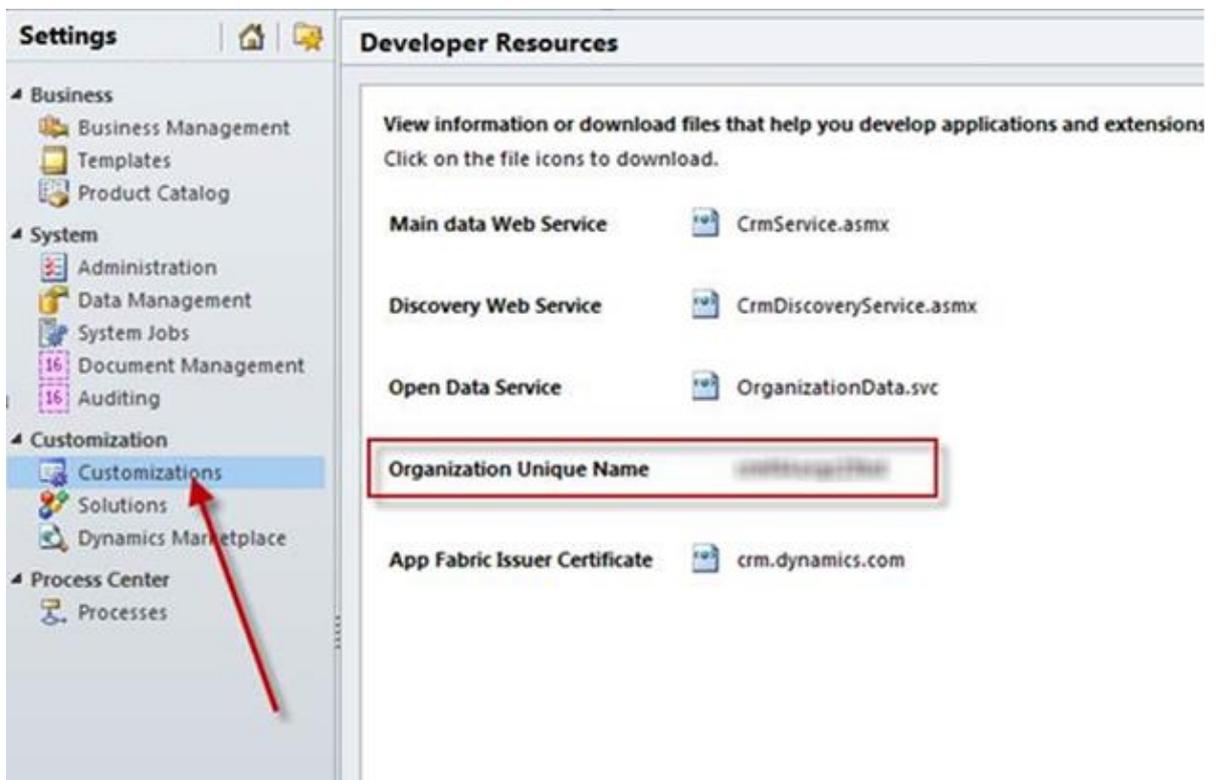
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- Input your CRM server informations as explained below.

CRM server Address : your CRM access address (you can get it from browser's address bar)

Organization Unique Id : you can get it from your crm Customization section regarding your CRM Version.

For instance in CRM online, you can get your crm organization unique name as shown below.



Settings |  

- Business
 - Business Management
 - Templates
 - Product Catalog
- System
 - Administration
 - Data Management
 - System Jobs
 - Document Management
 - Auditing
- Customization
 - Customizations** (highlighted with a red arrow)
 - Solutions
 - Dynamics Marketplace
- Process Center
 - Processes

Developer Resources

View information or download files that help you develop applications and extensions
Click on the file icons to download.

Main data Web Service	 CrmService.asmx
Discovery Web Service	 CrmDiscoveryService.asmx
Open Data Service	 OrganizationData.svc
Organization Unique Name	<input type="text" value="contoso.org-01234"/>
App Fabric Issuer Certificate	 crm.dynamics.com

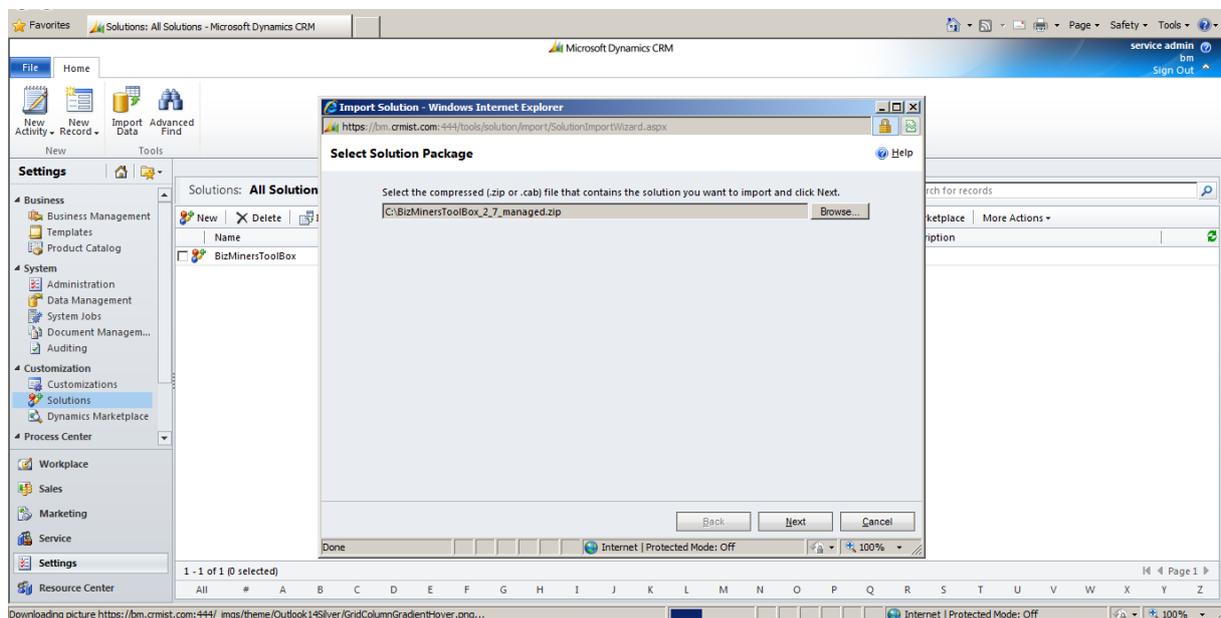
2. Download and Install BizMailChimp Application

Visit <http://bizminers.com/products/bizmailchimp/> download section

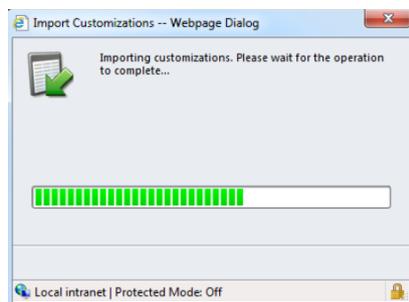
- Download and install “BizMailChimp” on your computer.
- Download customization file regarding your CRM version

3. Apply customizations by importing solution on CRM

- *New installation:* Login to your Dynamics CRM, go to Settings>Solutions and click “Import”



Choose the solution customization file that you already downloaded then click Next.



Once the solution importing is done, you will see a customization summary which shows imported Bizminers Solution entities.

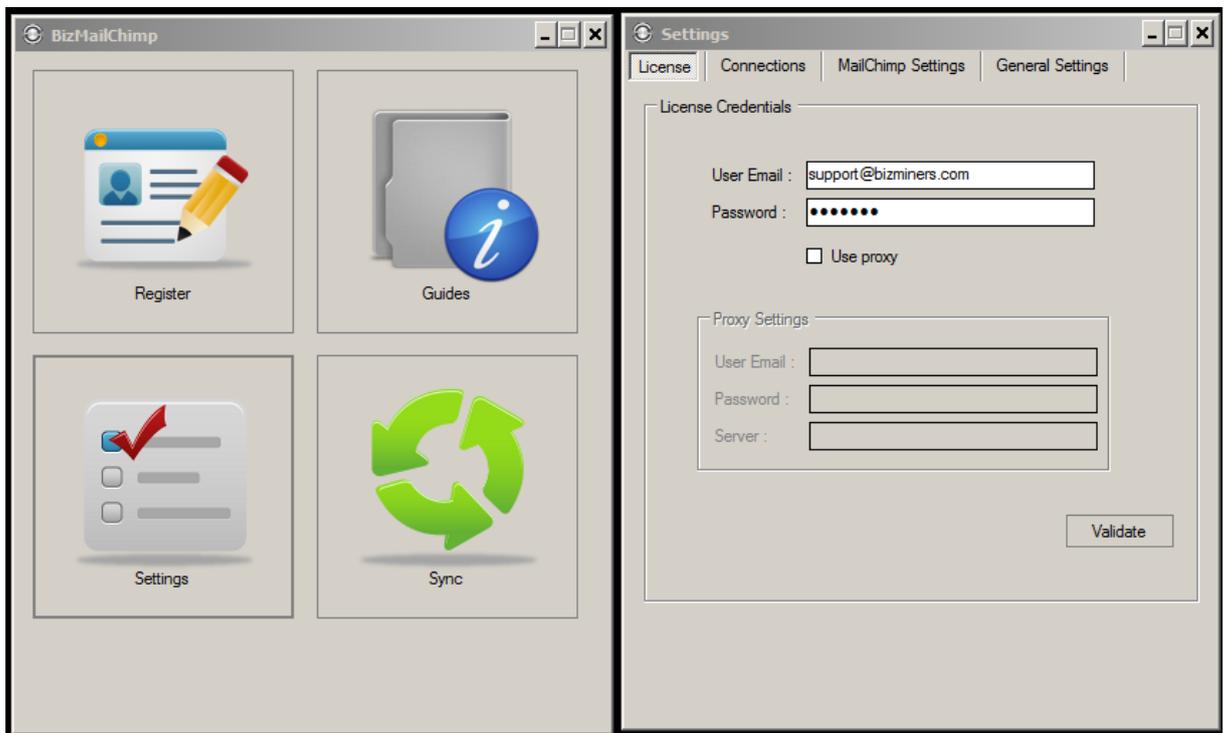
- *Existing Installation:* If you already have installed BizMailChimp (called Bmtoolbox earlier than version 2.0) then you don't need to uninstall. You just import the downloaded solution, follow the wizard and choose overwrite customizations during the installation.

4. Configuring BizMailChimp

- **License Validation**

If you already validate before, you don't need to do this step again unless you change any connection information.

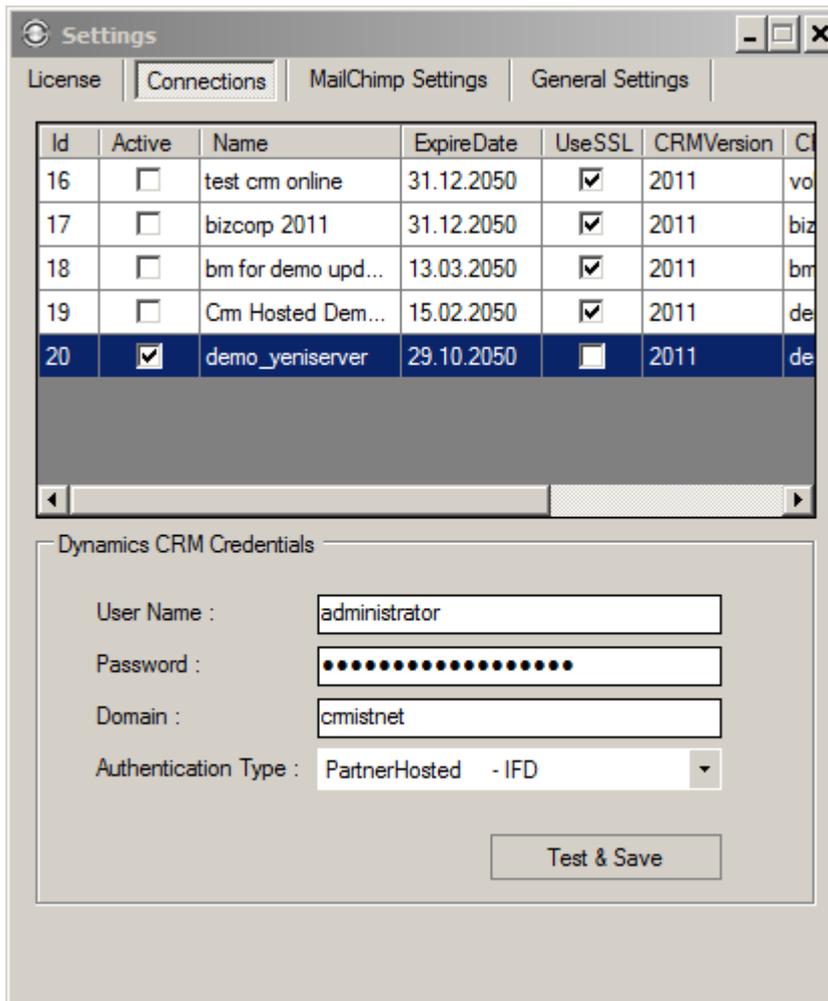
If you are running BizMailChimp for the first time, Run the BizMailChimp Application, click Settings button, enter your email&password that you've used while registering lic.bizminers.com web site (VoliTek Licence Platform <http://lic.bizminers.com>) on License tab, then click validate. Validation needs internet connection. If your internet connection use proxy, proxy settings must be entered as well. BizMailChimp will check your license and prompt validation success message. If validation succeeded then go to next step.



- **Configure Dynamics CRM Connection settings**

After validation, you will see all your registered connections on the connection tab. Only crm server address, organization name and version informations saved on our license server. Your CRM credentials only saved on your computer and will be used to access your CRM by BizMailChimp.

Please select the connection on the list and input credential values then press "Test & Save" button. You can view saved connection values which you already created on our License Server (<http://lic.bizminers.com>) by selecting for each connection record. When the connection succeeded, you will get the message at the status bar.



Note: Since Microsoft has changed CRM Online signin process, if you sign in your CRM Online account using Office 365 Platform, you should select Authentication Type as "Office 365". If you don't use Office 365 Platform, you should leave Authentication Type as "Microsoft CRM Online"

- **Mailchimp Settings: Getting Mailchimp API Key**

Login to your Mailchimp Account, choose "API Keys" link on Account menu. Take note your API key and keep in safe. If you never create an API Key, create a new key.

Your API keys

API keys provide full access to your MailChimp account, so keep them like a secret. [Tips on keeping API keys safe.](#)

Created	User	Label
Nov 29, 2013 03:32 pm	bizminerstest2 (owner)	none set
Apr 02, 2011 02:25 am	bizminerstest2 (owner)	none set

Create A Key

Create A Mandrill API Key

Account settings ▾ Billing ▾ Extras ▾ Integrations Rewards ▾

API keys

API keys
Registered apps
Add-ons

About the API

The MailChimp API makes it easy for programmers to integrate many of MailChimp's features into other applications. Interested in learning more?

[Read The API Documentation](#)

Developing an app?

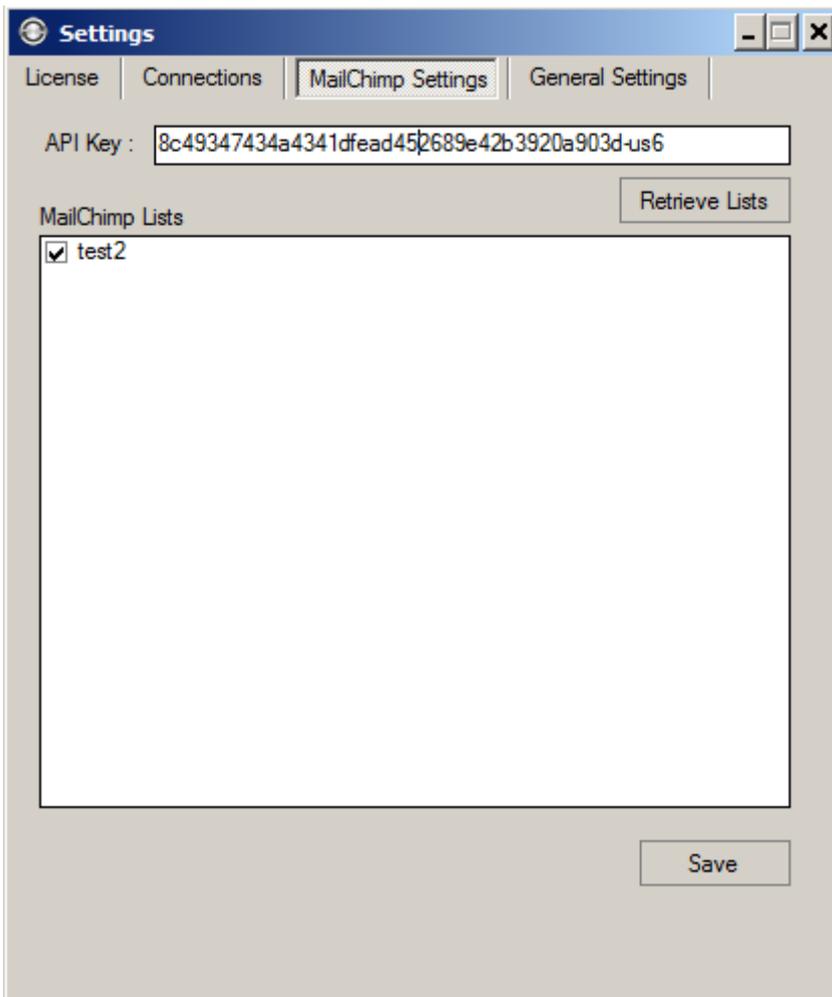
Writing your own application that requires access to other MailChimp users' accounts? Check out our [OAuth2 API documentation](#), then register your app.

[Register And Manage Your Apps](#)

Your API keys

API keys provide full access to your MailChimp account, so keep them like a secret. [Tips on keeping API keys safe.](#)

Created	User	Label	API Key	QR Code	Status
Nov 29, 2013 03:32 pm	bizminerstest2 (owner)	none set	62868vg695642d0dd7453b92211ad8c	QR	Disable



The screenshot shows a 'Settings' window with tabs for 'License', 'Connections', 'MailChimp Settings', and 'General Settings'. The 'MailChimp Settings' tab is active. It contains an 'API Key' field with the value '8c49347434a4341dfead452689e42b3920a903d-us6'. Below this is a 'MailChimp Lists' section with a 'Retrieve Lists' button. A list box contains one item, 'test2', which is checked. A 'Save' button is located at the bottom right of the window.

Input your API Key on "Mailchimp settings" tab and click "Retrieve Lists" button. Your Mailchimp master lists will be listed. Please choose which list will be used for synchronization then click save.

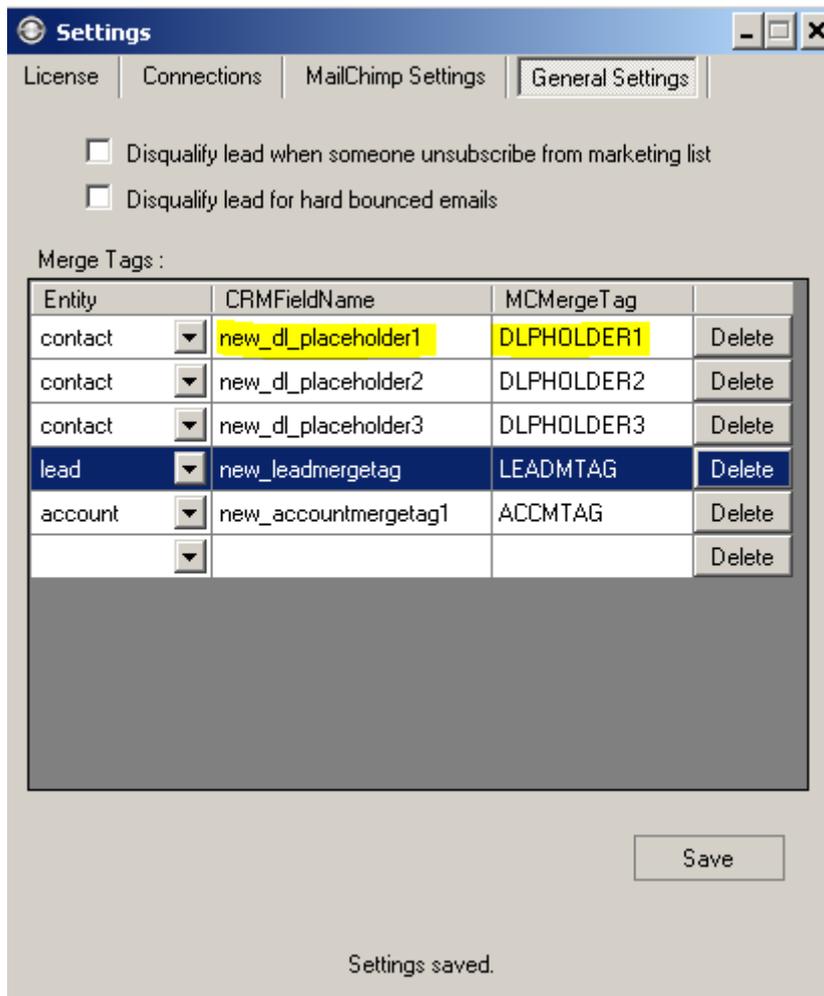
- **Configuring General Settings**

On the General settings tab, you can see options for your CRM actions.

- 1. Triggered CRM actions**

You can choose disqualifying lead regarding sent campaign email action results. Please select these options below if you need additional CRM actions after sync process. For instance if someone who is recorded as lead on CRM and unsubscribed from your Mailchimp list, then you can disqualify the lead by checking this option.

- 2. Merge Tags**



The screenshot shows the 'Settings' window with the 'General Settings' tab selected. There are two unchecked checkboxes: 'Disqualify lead when someone unsubscribe from marketing list' and 'Disqualify lead for hard bounced emails'. Below these is a 'Merge Tags' section with a table. The table has four columns: 'Entity', 'CRMFieldName', 'MCMergeTag', and a 'Delete' button. The table contains six rows, with the fourth row highlighted in blue.

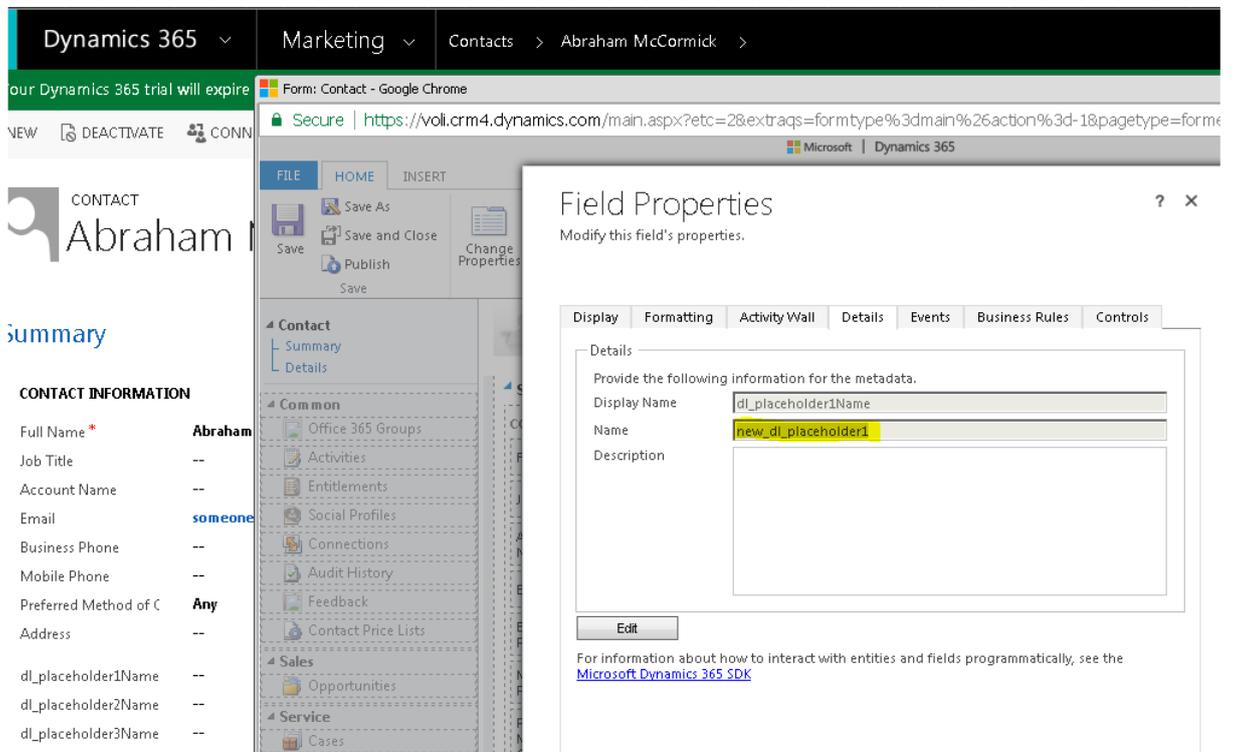
Entity	CRMFieldName	MCMergeTag	
contact	new_dl_placeholder1	DLPHOLDER1	Delete
contact	new_dl_placeholder2	DLPHOLDER2	Delete
contact	new_dl_placeholder3	DLPHOLDER3	Delete
lead	new_leadmergetag	LEADMTAG	Delete
account	new_accountmergetag1	ACCMTAG	Delete
			Delete

At the bottom right of the window is a 'Save' button. Below the window, the text 'Settings saved.' is displayed.

You can define unlimited merge tags for Dynamics CRM and Mailchimp sync. If you need syncing list members who have special fields on CRM between CRM and MailChimp list. Then you should add merge tags records as shown above. Please input CRM fieldname values into FieldName field. Mergetag field limited to 10 characters by MailChimp. So you should input Mailchimp mergetag value into MergeTag field which you defined mergetag fields on your MailChimp account. If you dont want to use merge field sync, please delete them all and click save button.

Field label and type	Required?	Visible?	Put this tag in your content:	Default merge tag value
Email Address email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	* EMAIL * or * MERGE0 *	
First Name text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	* FNAME * or * MERGE1 *	Default merge tag value 
Last Name text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	* LNAME * or * MERGE2 *	Default merge tag value 
dl1 text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	* DLPHOLDER1 * or * MERGE5 *	Default merge tag value 
dl2 text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	* DLPHOLDER2 * or * MERGE6 *	Default merge tag value 
dl3 text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	* DLPHOLDER3 * or * MERGE4 *	Default merge tag value 
accountmergetag text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	* ACCMTAG * or * MERGE7 *	Default merge tag value 
leadmergetag text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	* LEADMTAG * or * MERGE8 *	Default merge tag value 

Merge Tag fields on MailChimp



The screenshot shows the Dynamics CRM interface for a contact named Abraham McCormick. A 'Field Properties' dialog box is open, showing the following details:

- Display Name: dl_placeholder1Name
- Name: new_dl_placeholder1
- Description: (empty)

The dialog box also includes an 'Edit' button and a link to the Microsoft Dynamics 365 SDK for more information on interacting with entities and fields programmatically.

Merge Tag fields on Dynamics CRM

That's all. You are ready to use BizMailChimp Dynamics CRM & Mailchimp Integration Tool.

If you need support, please contact Volitek Support Team by using support@bizminers.com

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