

# Dynamics CRM & Mailchimp Subscribers Synchronizer Installation Guide

## Introduction

This document outlines the components and controls that are available to integrate Dynamics CRM and Mailchimp Email Marketing Services.

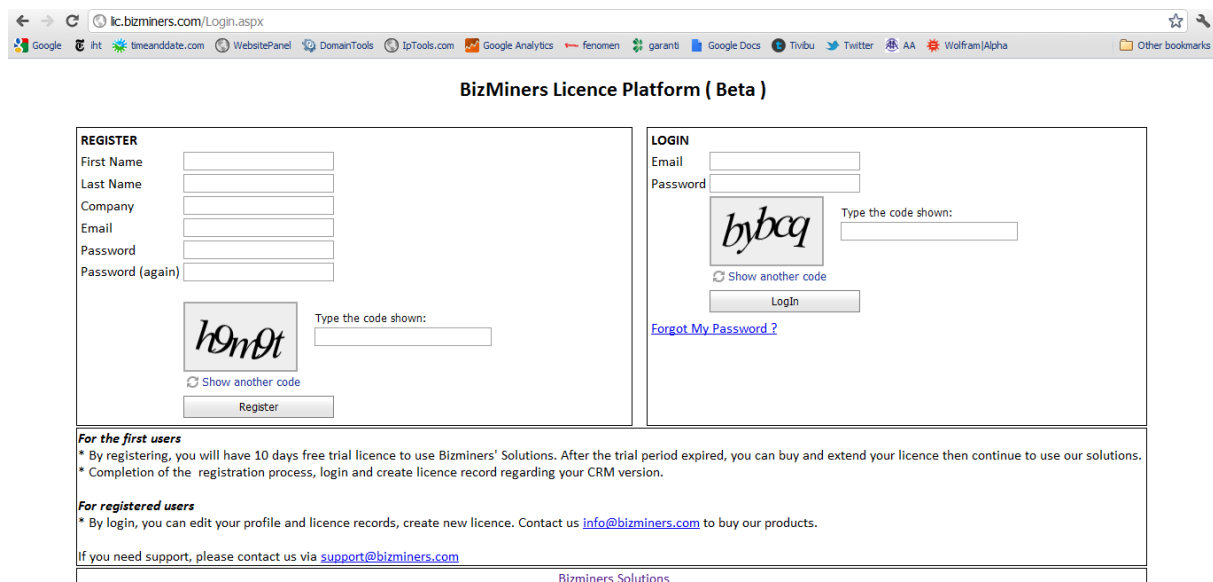
Dynamics CRM Email Marketing Tool requires .Net 3.5 and .Net framework updates besides we assume your server, where Bmtoolbox runs, is connected to the web.

If you already installed Bmtoolbox and using Bizminers Dynamics CRM&Mailchimp Integration Tool, you can skip these following steps which you already done. Since these two products use the same BmToolBox platform and you just need to apply Dynamics CRM & Mailchimp Subscribers Synchronizer specific settings described below.

### 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 Bizminers.

If you already registered before, you can login and create connections to use.



The screenshot shows a web browser window with the URL [lic.bizminers.com/Login.aspx](http://lic.bizminers.com/Login.aspx). The page title is "BizMiners Licence Platform ( Beta )". It features two main sections: "REGISTER" and "LOGIN".

**REGISTER Section:**

- Fields: First Name, Last Name, Company, Email, Password, Password (again).
- Image: A CAPTCHA image with the text "h9m0t".
- Text: "Type the code shown:" followed by an input field.
- Link: "Show another code".
- Button: "Register".

**LOGIN Section:**

- Fields: Email, Password.
- Image: A CAPTCHA image with the text "bybcq".
- Text: "Type the code shown:" followed by an input field.
- Link: "Show another code".
- Button: "Login".
- Link: "Forgot My Password ?".

**Footer/Disclaimer:**

**For the first users**

- \* By registering, you will have 10 days free trial licence to use Bizminers' Solutions. After the trial period expired, you can buy and extend your licence then continue to use our solutions.
- \* Completion of the registration process, login and create licence record regarding your CRM version.

**For registered users**

- \* By login, you can edit your profile and licence records, create new licence. Contact us [info@bizminers.com](mailto:info@bizminers.com) to buy our products.

If you need support, please contact us via [support@bizminers.com](mailto:support@bizminers.com)

Bizminers Solutions

Please pay attention to choose right product while creating the connection. If you already use Bmtoolbox and want to use "Dynamics CRM & Mailchimp Subscribers Synchronizer", you should create a new connection and select this product.

ic.bizminers.com/RegisterConnection.aspx?connid=169

Google | iht | timeanddate.com | WebsitePanel | DomainTools | GA | fenomen | garanti | GDocs | Twitter | Wolfram|Alpha | iCloud | DnsPedia | LinkedIn

### BizMiners Licence Platform ( Beta )

Info | Profile | Connections | **Register New Connection** | LogOut

**Register New Connection**

Product: Dynamics CRM & Mailchimp Subscribers Synchronizer

Dynamics CRM Version: 2011

Dynamics CRM Server: https:// | bm.crmist.com:444

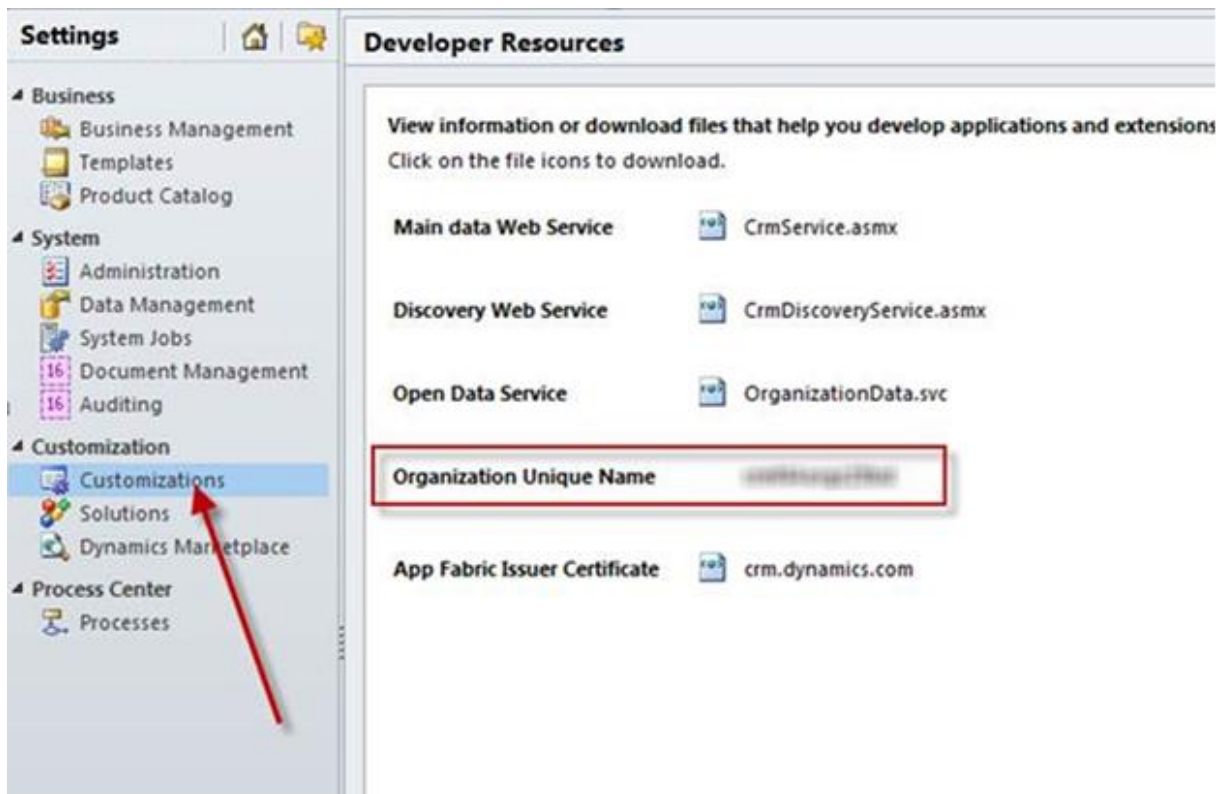
Organization Unique Name: bm

Give A Name To Your Connection: denem syncer

Save

The connections you are about to save will be placed under trial licence.  
Once the licence fee transaction completed ,your registered connection will be moved into full licence cover.

- Jump “Register New Connection” tab and input your CRM server informations as above.
- CRM version : 2011 or 4.0
- CRM server : your CRM access address (you can get it from browser’s address bar)
- Organization Unique Name : 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.



## 2. Download and Install Bmtoolbox

Visit <http://www.bizminers.com/eng/download/>

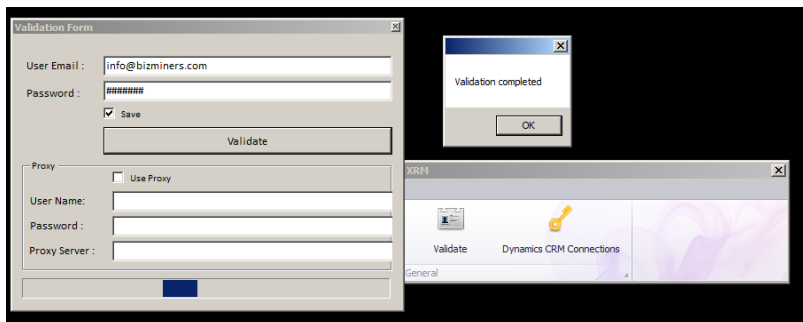
- Download and install “Bizminers XRM Toolbox” on your computer. Bizminers XRM Toolbox needs Windows Identity Foundation, if you haven’t installed please download and install it from <http://www.microsoft.com/downloads/en/details.aspx?FamilyID=eb9c345f-e830-40b8-a5fe-ae7a864c4d76>

### 3. Configuring Bmtoolbox

- **License Validation**

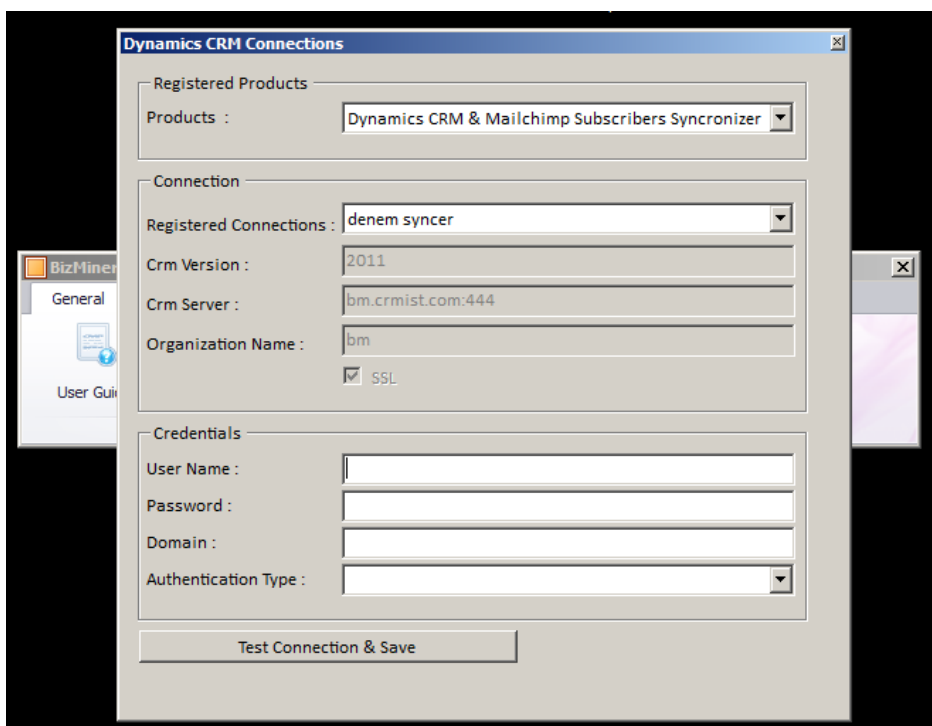
If you are running BmToolbox for the first time, Run the Bmtoolbox Application, click Validate menu, enter your email&password that you've used while registering lic.bizminers.com web site (BizMiners Licence Platform), then click validate. Validation needs internet connection. If your internet connection use proxy, proxy settings must be entered as well. Bmtoolbox check your license info and prompt validation success message. Click OK, close validation form and go to next step.

**Please validate if you start using “Dynamics CRM & Mailchimp Subscribers Synchronizer” for the first time to get your new connection information regarding the product.**

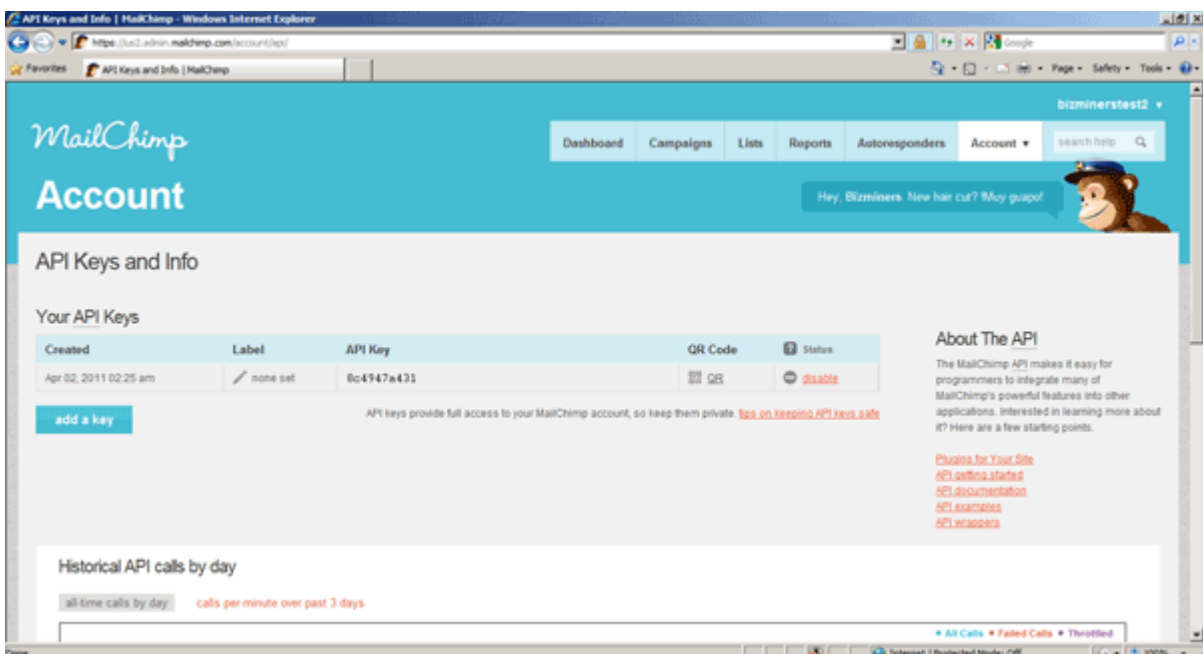
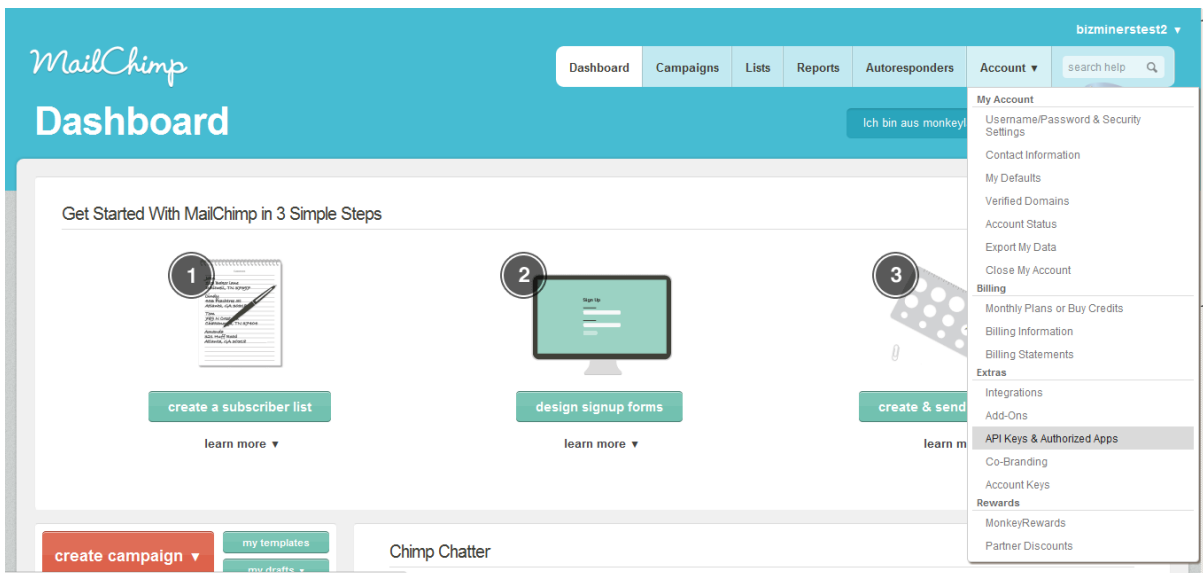


- **Configure Dynamics CRM Connection settings**

After validation, second step is managing CRM access credentials for Bmtoolbox. These values will be saved on your computer and will be used for your CRM connection. Input credential values and press “Test Connection & Save” button. You can view saved connection values which you already created on our License Server(lic.bizminers.com) by selecting registered connection DropDownList for each connection. Input values and click “Test Connection & Save” button. When the connection succeeded, “Connection Done” message appears, after saving the values, “Connection properties saved” message appears.

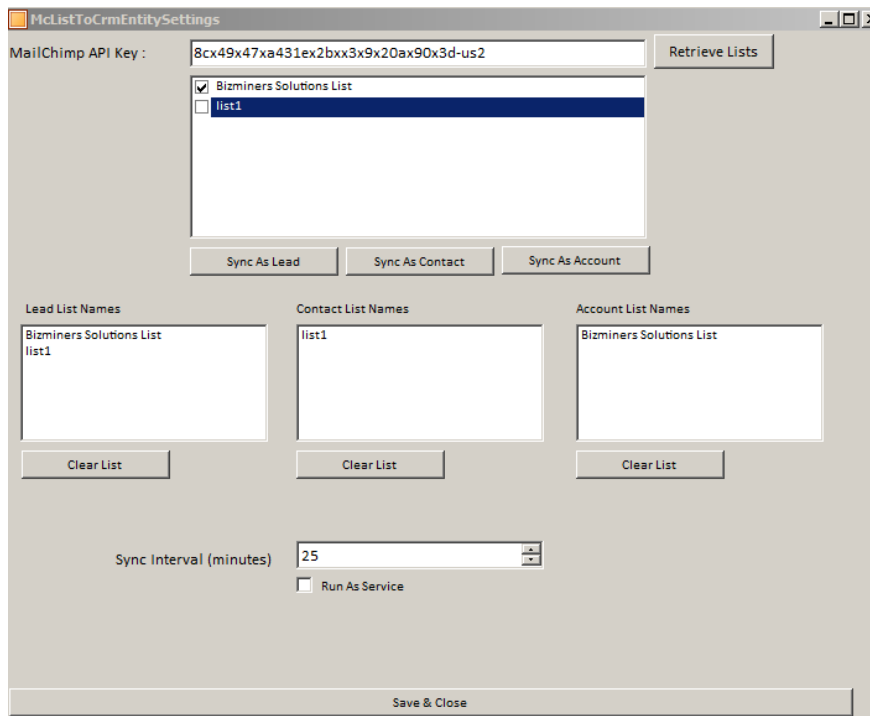


- Getting Mailchimp API Key;**  
 Login to your Mailchimp Account, choose API Keys & Authorized Apps link on Account menu. Take note your API key and keep in safe. During the configuration Bmtoolbox, you will input API Key into Bmtoolbox application



- **Configuring List Sync settings**

On the Subscriber Synchronizer tab, you can see buttons just for list sync operations. Settings and start/stop service. After getting your API Key value described above, input your Mailchimp API key to “Mailchimp API Key” section. Then press “Retrieve Lists” which lists your Marketing Lists you created on your Mailchimp account.



The screenshot shows a window titled "McListToCrmEntitySettings" with the following elements:

- MailChimp API Key :** A text box containing "8cx49x47xa431ex2bxx3x9x20ax90x3d-us2" and a "Retrieve Lists" button.
- List Selection:** A list box with "Bizminers Solutions List" (checked) and "list1" (unchecked).
- Sync Buttons:** Three buttons labeled "Sync As Lead", "Sync As Contact", and "Sync As Account".
- List Name Fields:** Three text boxes labeled "Lead List Names", "Contact List Names", and "Account List Names". The "Lead List Names" box contains "Bizminers Solutions List" and "list1". The "Contact List Names" box contains "list1". The "Account List Names" box contains "Bizminers Solutions List". Each box has a "Clear List" button below it.
- Sync Interval (minutes):** A spinner box set to "25".
- Run As Service:** A checkbox labeled "Run As Service" which is currently unchecked.
- Save & Close:** A button at the bottom of the window.

Before starting sync, you should select lists and attach them regarding CRM record types(As lead, contact or account). BMToolBox can run as a service or manually on your computer to synchronize Dynamics CRM & MailChimp. If you would like to run BMTooBox synchronization as a service, type synchronizing interval as minute and check “Run as Service” checkbox. If you unchecked this selection, the synchronization will run manually by pressing a switch button “Stopped/Working” on Subscriber Synchronizer tab. Save selected settings by clicking “Save&Close” button.

That’s all. You are ready to use Bizminers Dynamics CRM & Mailchimp Subscriber Synchronizer.

Please keep in mind UAC (User Account Control) prevents BmtoolBox to run, You have to use administrator account or disable UAC on Windows 7/2008 platforms.

If you need further support, please contact Bizminers Support Team using [support@bizminers.com](mailto:support@bizminers.com)  
Bizminers Solutions