

Bizminers Dynamics CRM & Mailchimp Subscribers Synchronizer User Guide

Getting Started

Bizminers Dynamics CRM & Mailchimp Subscribers Synchronizer provides a quick way to start leveraging data between Dynamics CRM and Mailchimp. This document explains how to use Dynamics CRM & Mailchimp Subscribers Synchronizer. We assume that installation and configuration is completed successfully and Bmtoolbox is ready to use.

You can find Installation Guide http://www.bizminers.com/eng/wp-content/uploads/2012/02/BizminersMailchimpSynchronizer_InstallationGuide.pdf

Features



Key Features

- Sync bi-directional your Dynamics CRM leads, accounts and contacts with Mailchimp list members
- You can choose Mailchimp Lists to sync
- Easy to use
- You can select leads, accounts or contacts for sync
- Anytime you update your contacts, leads and accounts in CRM, it will be updated in [MailChimp](#)
- Mailchimp subscribers easily sync with your Dynamics CRM as lead, account and contact



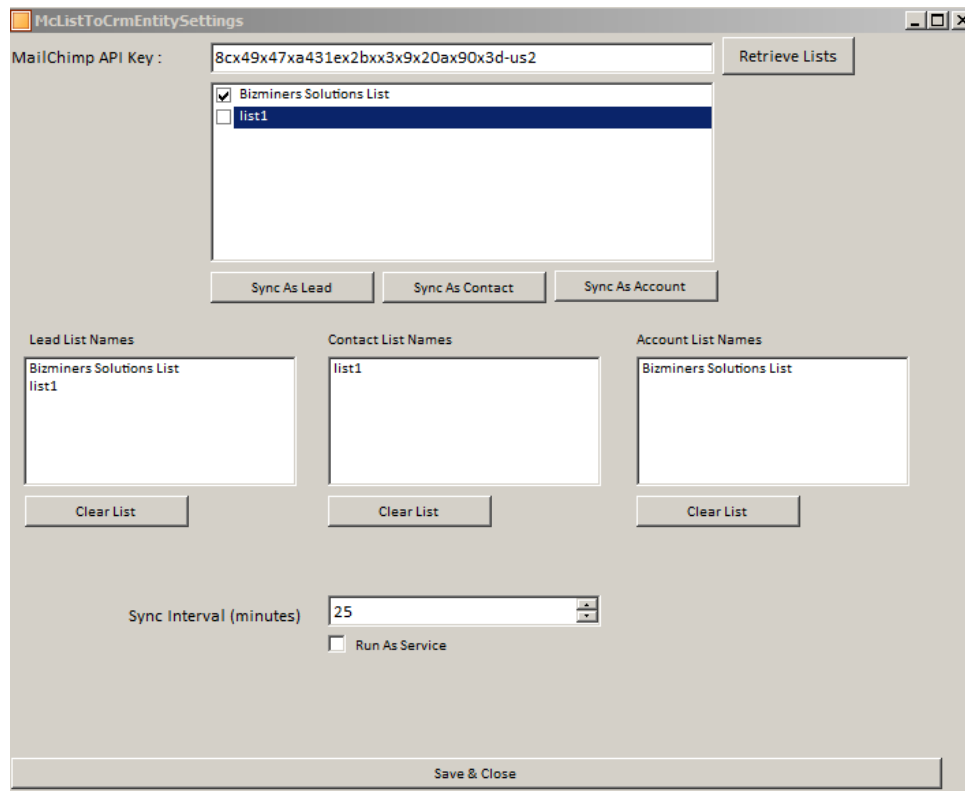
Technical Features

- Easy to setup and installation
- You don't need to install application on your CRM server.
- You can run the application as a service or manually
- There is no need customization on your CRM

Configuring List Sync Settings

We assume that you validated your license and configured Dynamics CRM Connection settings as explained on "BizminersMailchimpSynchronizer_InstallationGuide" which you can download from <http://www.bizminers.com/eng/guides/>

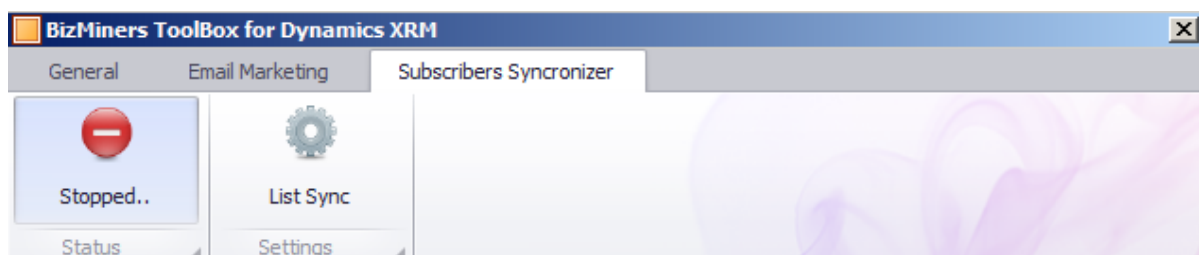
Run the Bmtoolbox Application, if you validate and have registered connection for "Bizminers Dynamics CRM & Mailchimp Subscribers Synchronizer", you will see a new tab on Bmtoolbox application called "Subscribers Synchronizer". On the Subscribers Synchronizer tab, you can see buttons just for list sync operations. Settings and start/stop service. 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.



Before starting sync, you should select lists and attach them regarding CRM record types (lead, contact or account). By pushing “Retrieve Lists” button, all lists on your Mailchimp account listed and you can check which lists will be synchronized. You can choose inserting your Mailchimp list subscribers as lead, contact, account or choose all of record types by pushing related button. If you choose all record types, your Mailchimp subscribers inserted all record types. After configuring list sync settings, save settings by clicking “Save&Close” button.

Synchronizing Subscribers

After configuring list sync settings and save, you can push sync button to start sync.



When you click sync button which turns stopped/working regarding the running status. It turns “working” while sync, turns “stopped” when sync finished.

Below figures shows sample records on Mailchimp and Dynamics CRM before and after sync.

Before Sync

list1

2 subscribers [View All](#) · [Add](#) · [Remove](#) [Change List](#) ▼

List Rating ★☆☆☆☆ [no rating yet](#) Created Feb 7, 2012

Subscribers

[bulk actions](#) ▼ | [select visible](#) | [select all](#) | view **subscribed** ▲▼ | [download](#) | [segment](#)

		Email Address	First Name	Last Name	Preferred format
<input type="checkbox"/>	View	support@bizminers.com	biz	supp mc	html
<input type="checkbox"/>	View	mcaccount@bizminers.com	bizminers	solution mc	html

Figure1: Subscribers on Mailchimp List

Sales | Leads | Opportunities | Accounts | Contacts | Marketing Lists

Leads: **My Open Leads** ▼

<input checked="" type="checkbox"/>	Name	Topic	Status Reason	Created On
<input checked="" type="checkbox"/>	bizminers solution dynamics crm lead	lead test	New	2/7/2012 11:23 PM

Figure2: Lead records on Dynamics CRM

Sales | Leads | Opportunities | Accounts | Contacts | Marketing Lists | Competitors

Accounts: **My Active Accounts** ▼

<input checked="" type="checkbox"/>	Account Name	Main Phone	Address 1: City	Primary Contact
<input checked="" type="checkbox"/>	BizminersSolutions dynamics crm account			

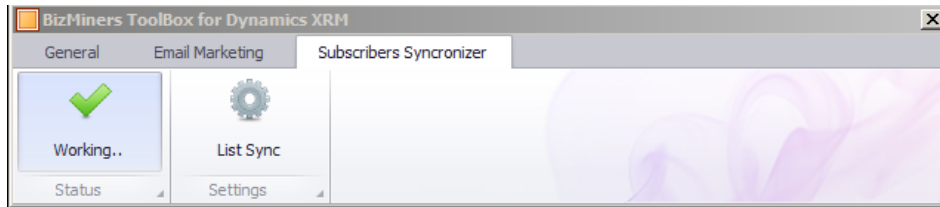
Figure3: Account records on Dynamics CRM

Sales | Leads | Opportunities | Accounts | Contacts | Marketing Lists

Contacts: **My Active Contacts** ▼

<input type="checkbox"/>	Full Name	E-mail	Parent Customer	Business Phone
<input type="checkbox"/>	Bizminers Solutions dynamics crm contact	crmcontact@bizminers.com		

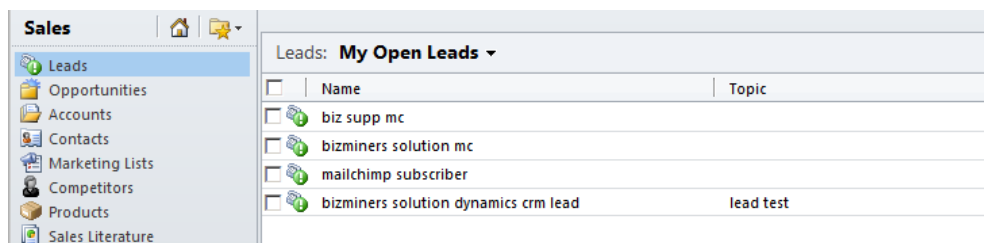
Figure4: Contact records on Dynamics CRM



After Sync

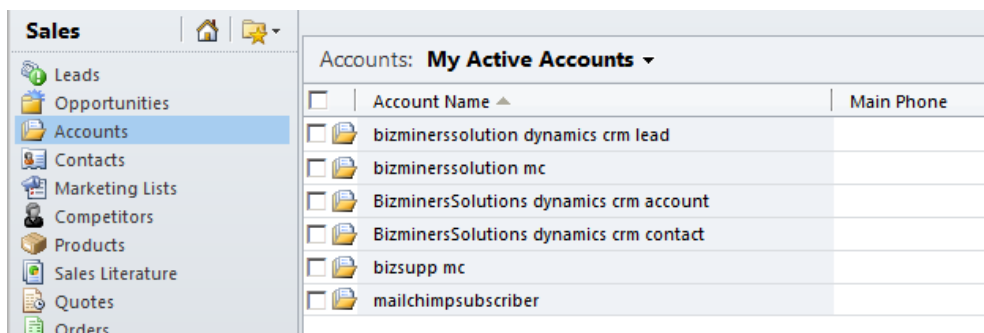
		Email Address	First Name	Last Name
<input type="checkbox"/>	View	support@bizminers.com	biz	supp mc
<input type="checkbox"/>	View	mcaccount@bizminers.com	bizminers	solution mc
<input type="checkbox"/>	View	crmlead@bizminers.com	bizminers	solution dynamics crm lead
<input type="checkbox"/>	View	crmcontact@bizminers.com	Bizminers	Solutions dynamics crm contact
<input type="checkbox"/>	View	crmaccount@bizminers.com	BizminersSolutions dynamics crm account	

Figure5: New added Dynamics CRM subscribers on Mailchimp



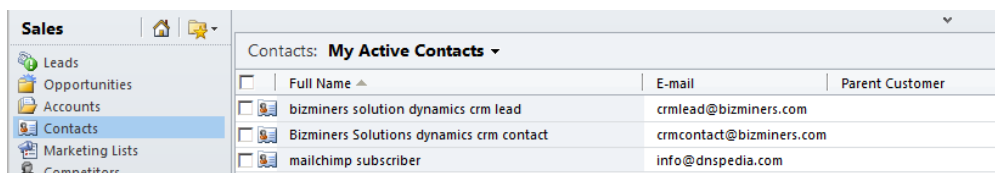
Leads: My Open Leads		
<input type="checkbox"/>	Name	Topic
<input type="checkbox"/>	biz supp mc	
<input type="checkbox"/>	bizminers solution mc	
<input type="checkbox"/>	mailchimp subscriber	
<input type="checkbox"/>	bizminers solution dynamics crm lead	lead test

Figure6: New added Mailchimp subscribers on Dynamics CRM as Lead



Accounts: My Active Accounts		
<input type="checkbox"/>	Account Name	Main Phone
<input type="checkbox"/>	bizminerssolution dynamics crm lead	
<input type="checkbox"/>	bizminerssolution mc	
<input type="checkbox"/>	BizminersSolutions dynamics crm account	
<input type="checkbox"/>	BizminersSolutions dynamics crm contact	
<input type="checkbox"/>	bizsupp mc	
<input type="checkbox"/>	mailchimpsubscriber	

Figure7: New added Mailchimp subscribers on Dynamics CRM as Account



Contacts: My Active Contacts			
<input type="checkbox"/>	Full Name	E-mail	Parent Customer
<input type="checkbox"/>	bizminers solution dynamics crm lead	crmlead@bizminers.com	
<input type="checkbox"/>	Bizminers Solutions dynamics crm contact	crmcontact@bizminers.com	
<input type="checkbox"/>	mailchimp subscriber	info@dnspedia.com	

Figure8: New added Mailchimp subscribers on Dynamics CRM as Contact

Please send your inquiries to info@bizminers.com. Also you can find answers to your questions visiting <http://www.bizminers.com/eng/category/faq/mailchimp/>