

Dynamics Crm Email Marketing Tool

1-Introduction

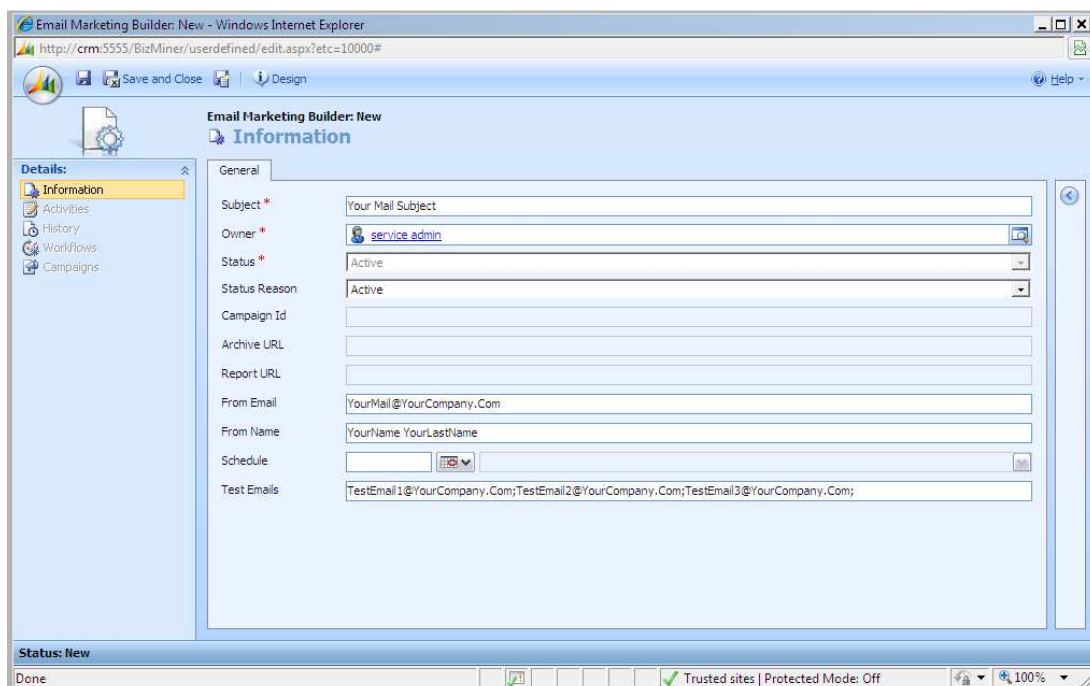
This document outlines the components and controls that are available to integrate Dynamics CRM 4.0 and MailChimp Services. This tool wraps the BizMiners Business Solutions Services and provides an easy way to use interface for applying the different methods for Email Marketing in Dynamics CRM 4.0. In addition, Dynamics CRM Email Marketing Tool provides a quick way to start leveraging data between Dynamics CRM 4.0 and E-Mail Statuses and Results.

Notice:Dynamics CRM Email Marketing Tool requires .Net 3.5 and .Net framework updates besides we assume your server ,where BizMiners Mail Console Service runs , is connected to the web

2-Operating Manual

a-How to create a new Email Marketing

- Create and save a new campaign in Dynamics CRM with required fields
- Set “Campaign Type” to “Email Marketing”
- Open the “LookUp” form for “Email Marketing Builder” field.
- Click the “New” button on the left-down
- Fill required fields the “Email Marketing Builder” form as shown below

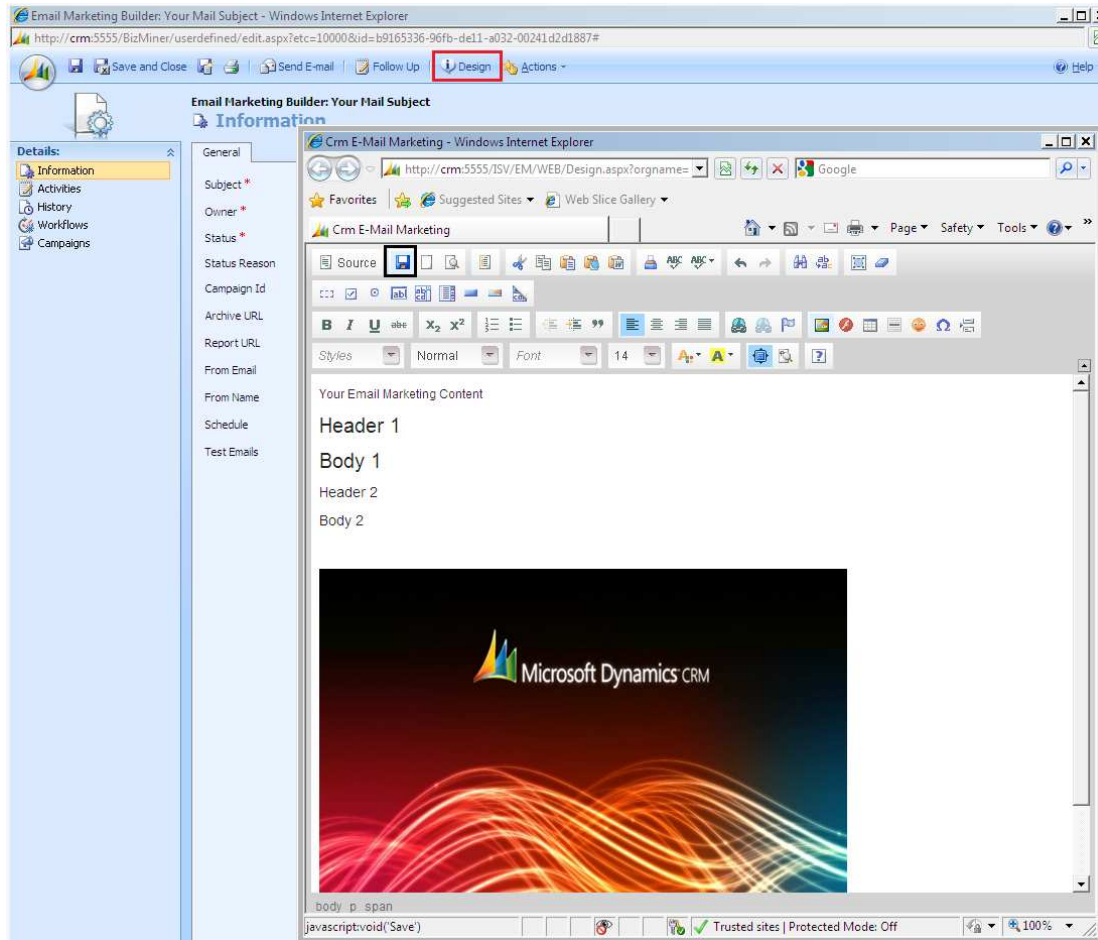


The screenshot shows the 'Email Marketing Builder: New' form in a Windows Internet Explorer browser window. The browser address bar shows the URL: <http://crm:5555/BizMiner/userdefined/edit.aspx?etc=10000#>. The browser menu includes 'Save and Close' and 'Design'. The page title is 'Email Marketing Builder: New' and the main heading is 'Information'. On the left, a 'Details' sidebar lists 'Information', 'Activities', 'History', 'Workflows', and 'Campaigns'. The main form area is titled 'General' and contains the following fields:

Subject *	Your Mail Subject
Owner *	service_admin
Status *	Active
Status Reason	Active
Campaign Id	
Archive URL	
Report URL	
From Email	YourMail@YourCompany.Com
From Name	YourName YourLastName
Schedule	
Test Emails	TestEmail1@YourCompany.Com;TestEmail2@YourCompany.Com;TestEmail3@YourCompany.Com;

The status bar at the bottom indicates 'Status: New' and 'Trusted sites | Protected Mode: Off'.

- After saving your “Email Marketing Builder” record ,you can start design your email content by clicking “Design” button on the form as shown below in the red rectangle



- Create your content for your recipients. While creating your content, you can send your email recipient specific email by using merge vars.

|FNAME| for First Name of your recipient

|LNAME| for Last Name of your recipient

For example, you have a recipient with firstname “Biz” and lastname “Miners”. If you want your email start “Dear Biz Miners....” you need to start designing your email content as “ Dear

|FNAME| *|LNAME|*”

- Once you complete your design , simply click “Save” button on the design page as shown above in the black rectangle
- Save and Close your “Email Marketing Builder” record

Note: if you let your Dynamics CRM campaign records status reason “Ready To Launch” ,the test emails will be sent and the status reason will be set “Proposed” itself.

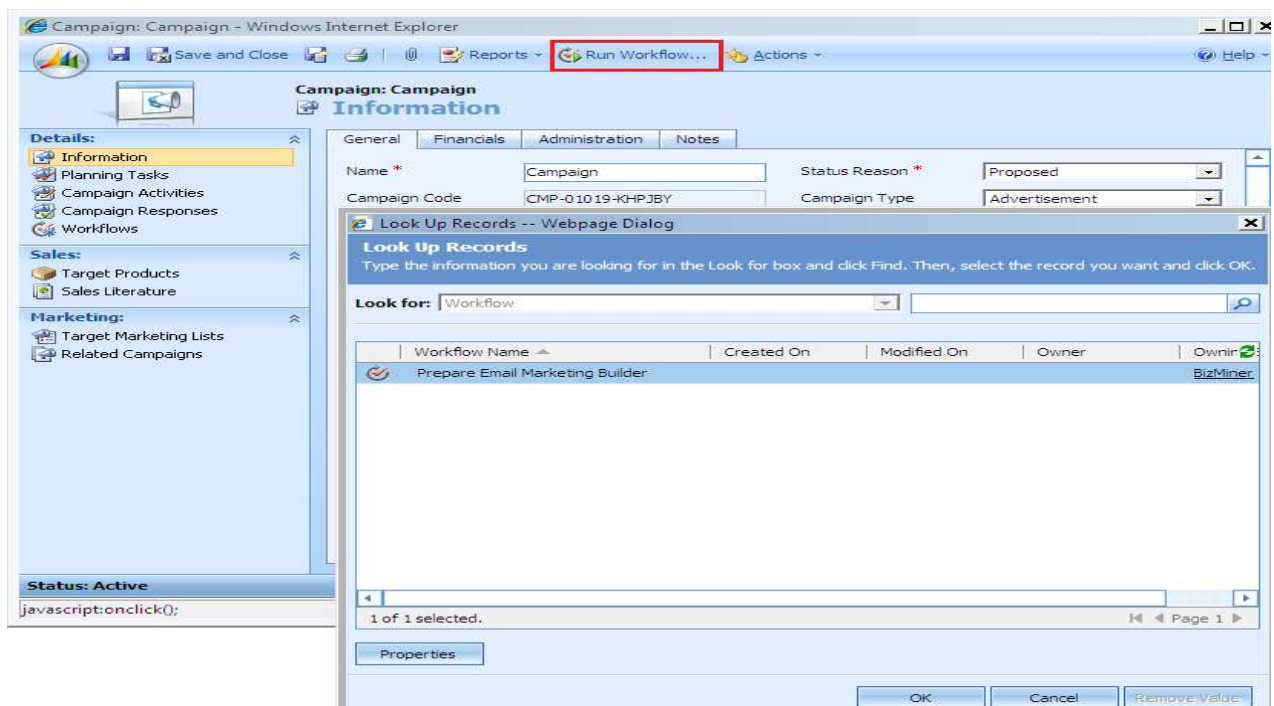
- Add your “Target Marketing Lists” in Dynamics CRM campaign record regarding your business needs.
- Once,you are ready to publish your email campaign ,set your Dynamics CRM campaign status reason to “Launched”

[For more about creating a new email marketing campaign please watch our video](#)

b-How to use an existing design for a new Dynamics CRM Campaign

If you want to use the same design ,We always suggest you to copy your design from an existing “Email Marketing Builder” record in to a new one and assign it to your new Dynamics CRM campaign record.

In some situations ,any user may want to use an existing “Email Marketing Builder” for a new campaign.In this situation,after assigning an existing “Email Marketing Builder” to your Dynamics CRM campaign , you need to use the workflow on the campaign , named “Prepare Email Marketing Builder”,on demand/manuall as shown below.



After running the workflow, assign your Target Marketing Lists for your Dynamics CRM campaign. Now, your campaign is ready to be sent.

[For more information please contact us !](#)

c- How to create simple poll

If you want to apply simple polls in your email marketing campaign, you just need to create a HTML list with unique urls as shown in the sample HTML code below

```
<div style="margin-left: 40px">
  <span id="span1" style="height: 550px;
    width: 550px; ">
    Company Poll 1
    <ul style="list-style-image: url('http://www.bizminers.com/img/sub-
bullet-1.png'); ">

      <li ><a href="http://url1">Answer 1</a></li>
      <li><a href="http://url2">Answer 2</a></li>
      <li><a href="http://url3">Answer 3</a></li>
      <li><a href="http://url4">Answer 4</a></li>
    </ul>

    <p>
    Company Poll 2
      <ul style=" list-style-image: url('http://www.bizminers.com/img/sub-
bullet-1.png'); ">

        <li><a href="http://url5">Answer 1</a></li>
        <li><a href="http://url6">Answer 2</a></li>
        <li><a href="http://url7">Answer 3</a></li>
        <li><a href="http://url8">Answer 4</a></li>
      </ul></p>

    </span>
  </div>
```

Simply, copy and paste the code in your design. Each click on the list elements will be retrieved in to Dynamics CRM as campaign response.

We suggest [SurveyGizmo](#) for your more professional surveys and polls. You can embed SurveyGizmo's documents in your email design.

Currently, BizMiners develops SurveyGizmo and Dynamics CRM integration in Beta V0.5.

For more information please contact to support team.

Happy Email Marketings !.

BizMiners Support Team
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