C2

Dynamics CRM

C2 Software

eMessenger

Email marketing for Dynamics CRM

User Guide

Revision History

Date	Version	Description	Author
29th April 2015	1.0	Initial Draft	Euan Macmaster
12th May 2015	1.1	Addition of 3rd Party Designer, accessing eMessenger	Euan Macmaster
15th May 2015	1.2	Update to screenshots on pages 12,13, 14	Euan Macmaster

Contents

What is eMessenger?

eMessenger from C2 is a software solution which integrates **Microsoft Dynamics CRM** with **Sign-Up.to**'s proven, EU based, email marketing platform. The solution allows users to create effective email campaigns, targeting **Dynamics CRM Contacts**, **Leads** and **Accounts**.

Campaign results are returned to **Dynamics CRM** as **Activities**, allowing you to track and manage your recipients' interactions with the campaign. These results can be viewed from within the campaign record, and are also tracked on the relevant entity record e.g. **Contact**, **Lead** or **Account**.

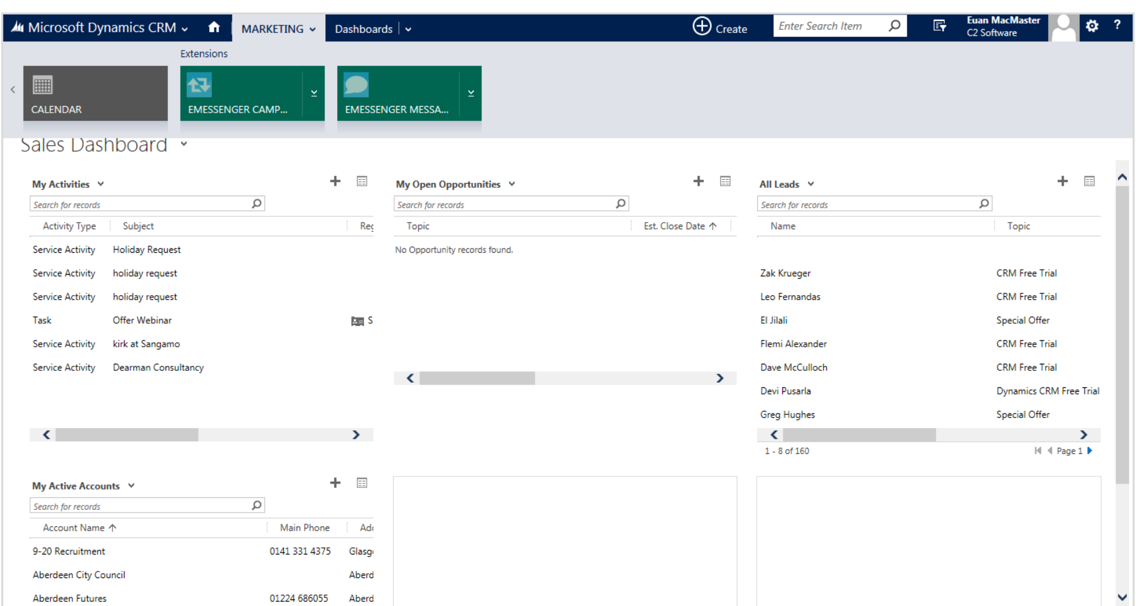
Combining the effectiveness of **Sign-Up.to**'s email marketing software with the power of **Dynamics CRM** gives you the ability to leverage from the **CRM** database to segment the audience and ensures that any email marketing interactions are accurately recorded on the customer record.

In addition the solution provides the framework for marketing automation, with the email marketing functionality being fully available from **Dynamics CRM** workflows.

Where do I access eMessenger?

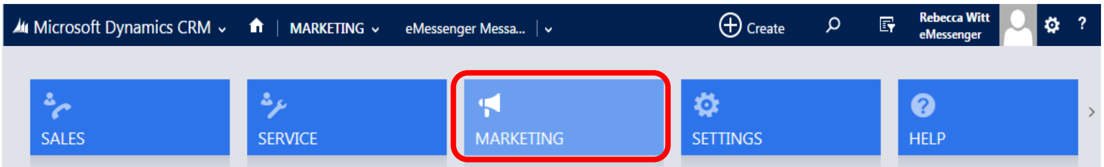
eMessenger can be accessed from within the **CRM** application.

In the **Marketing** area, new tiles can be found which relate to the new **eMessenger** functions.

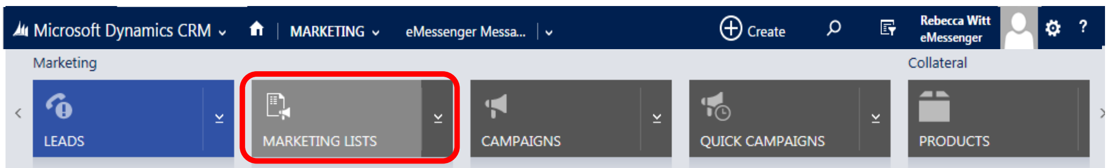


Accessing CRM Marketing Lists

New **Marketing Lists** are created by first navigating to the **Marketing** area of **CRM**,

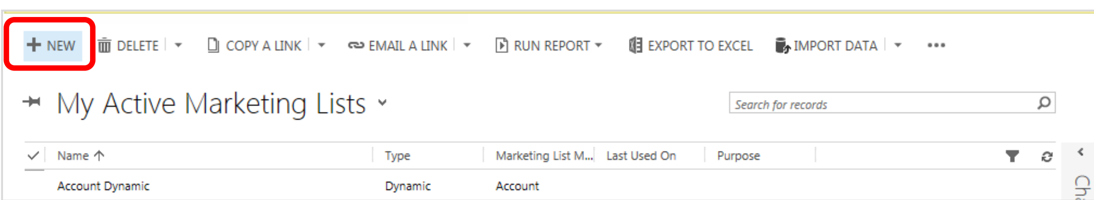


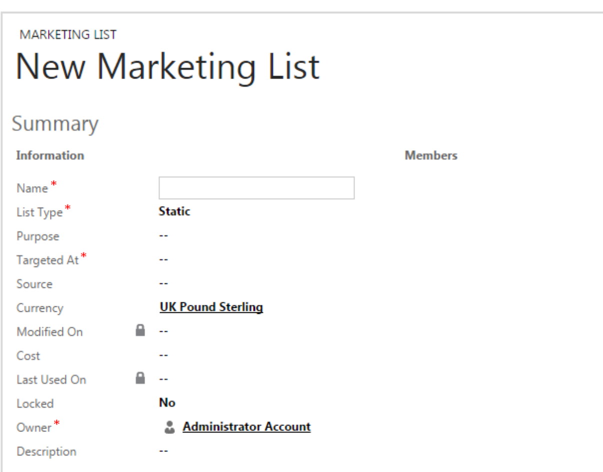
...and then to **Marketing Lists**.



Creating a New Marketing List

Once in the correct area, simply click on **New** to begin the creation of a new list.





Users must:

- Assign a name for their **Marketing List**
- Define if the **List** should be *Static* or *Dynamic**
- Select a record type which the **Marketing List** should consist of – options are *Contact*, *Account* or *Lead*.

The list must then be saved before moving on to adding members to it.

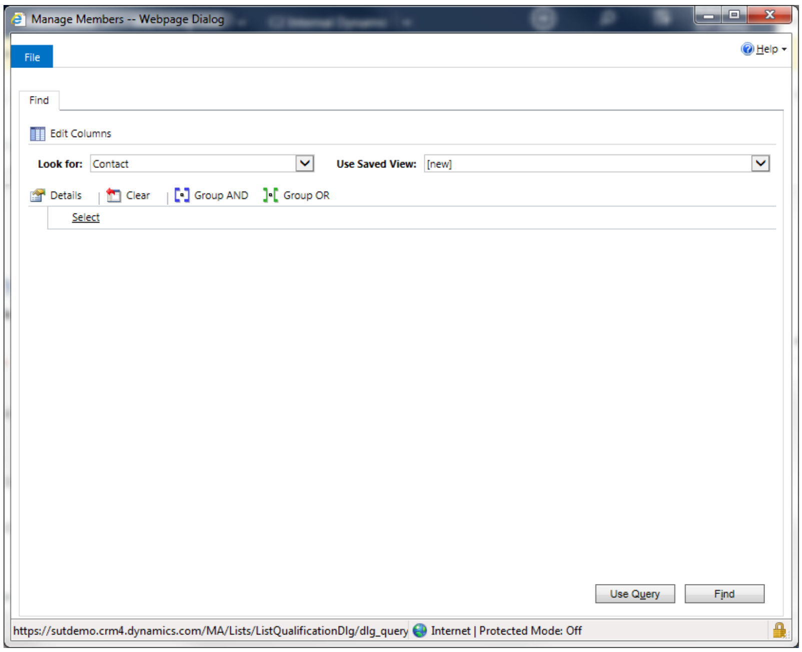
**a Dynamic Marketing List is one where the members are automatically updated/added/removed as they meet/fail to meet the filter criteria.*

For example, if you had a Dynamic Marketing List comprising of Leads aged over 65, any Leads who reach the age of 65 will automatically be added to the list. Any newly created Leads who meet the criteria will also be added automatically.

Adding Members to a Dynamic Marketing List

Once the **Marketing List** is saved, users will be able to add members to it, by clicking the **Manage Members** link at the top of the screen (which will not appear until the **List** is saved)

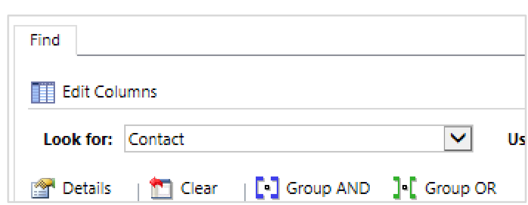
This will generate an **Advanced Find** type screen which allows the user to build the filter criteria for their list.



The first thing to select is the type of entity to be searched for.

In this example we shall add a **Dynamic Marketing List** which is made up of **Contacts**.

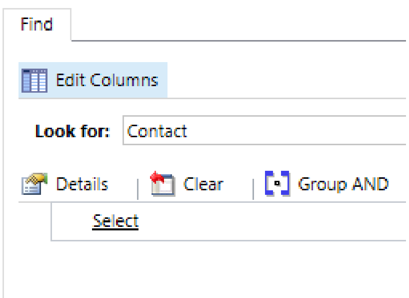
So, to create a **List** of **Contacts** the user must select **Contacts** in the *Look for:* field.

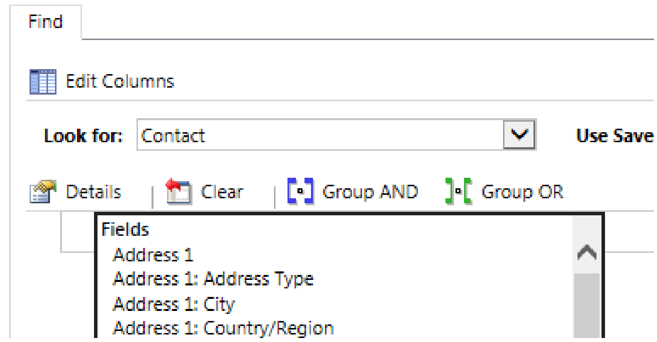


As it stands, the **List** will comprise of all **Contacts** in the system. It is therefore necessary to set the parameters of your **List** i.e. determine which **Contacts** should be added.

Defining the List Parameters

To add filter criteria, click *Select* underneath *Details* which will generate a dropdown list.





This lists all of the fields of data on the **Contact**. If, for example, the user wished to create a list of **Contacts** who live in London, they would select **Address 1: City** from the drop down, then *equals* for the search term, and enter *London* in the text box.

In the drop down list, **CRM** lists all of the fields on the **Contact**, and below these it lists all of the other **CRM** entities which are connected to the **Contact**. These can also be used to filter the **Members List**.

Complex logic can be applied by grouping clauses together and using AND/OR statements

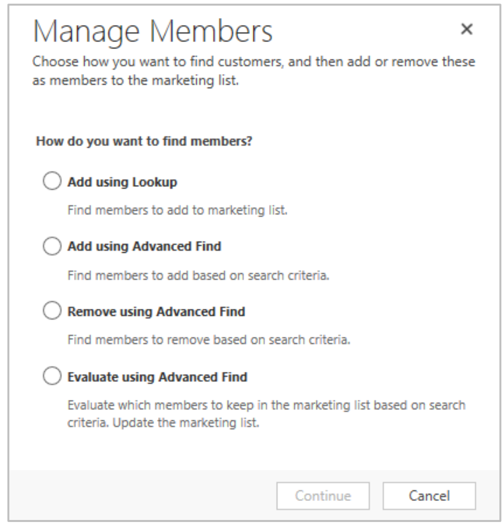
Once the filter criteria have been entered, the user can see a preview of the **List** by clicking **Find**.

If a preview is not required, or if the user has pre-viewed the data and is happy with it, click **Use Query** to build the **Marketing List**.

Dynamics CRM will then add all of the **Contacts** which meet the criteria to the **List**.

Adding Members to a Static Marketing List

Adding **Members** to a static **Marketing List** is similar to adding them to a **Dynamic List**. Again the user should click *Manage Members*, which will generate a popup box giving the user 4 options.

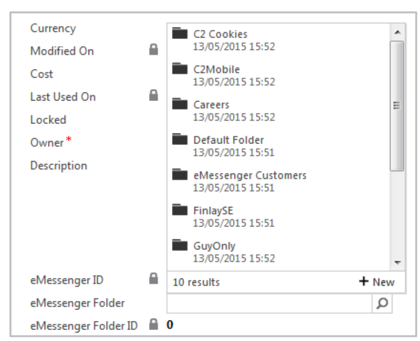


Add using **Lookup** uses **CRM's** lookup facility to show list of records which can be added manually.

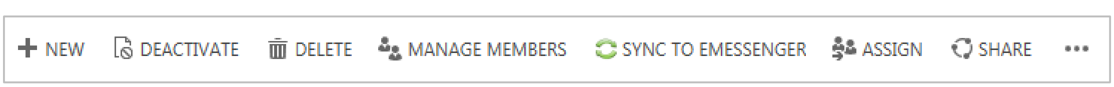
The other 3 options all use the **Advanced Find** facility to enter logic (in the same way as when adding members to a **Dynamic List**) to *Add*, *Remove* or *Evaluate* any existing **List Members**.

Synchronising the new Marketing List with eMessenger

Once the list has been created, it should be synchronised with **eMessenger** so that it can be used to send bulk emails.



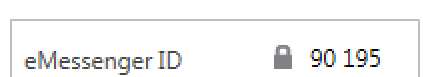
Should you wish to synchronise the list into a specific folder within **eMessenger**, this can be selected from the **eMessenger Folder** lookup field.



This is done by clicking the **Sync to eMessenger** icon at the top of the **Marketing List** form.

After clicking this button the user must wait a few seconds and then refresh the page by pressing *F5* or clicking the refresh/reload icon on the browser.

Once synchronised the **eMessenger ID** field will be populated, as will the **Folder ID** field (if one has been selected).

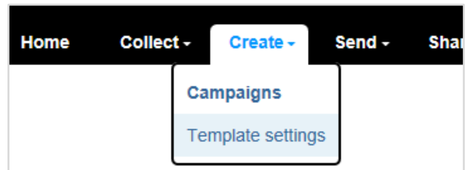


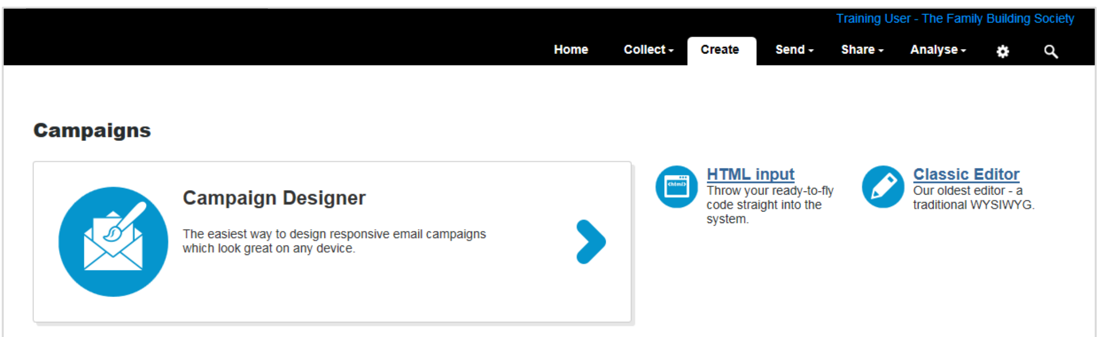
Creating the Email Message

The **Email Message** can be created using **Sign-Up**.**to**'s **Campaign Designer** or using another editor of choice.

Creating the Email Message via Sign-Up.to

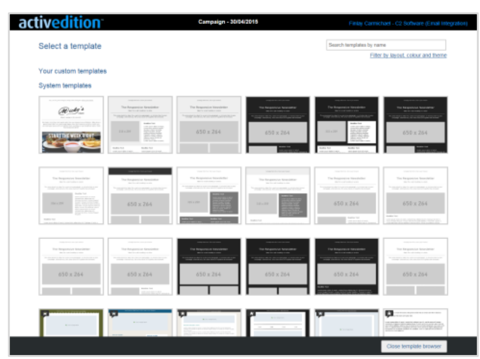
A message can be created in **Sign-Up.to** via the **Campaign Designer**, found by clicking *Create* and then *Campaigns*.



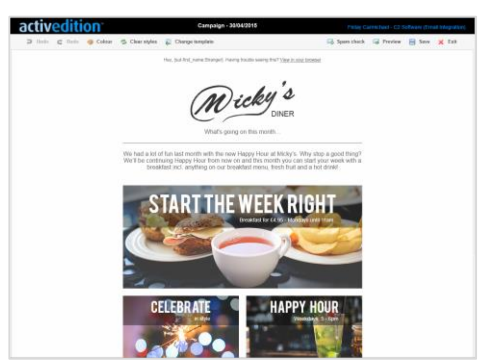


Clicking the large **Campaign Designer** icon opens a selection of templates with which to build the message.

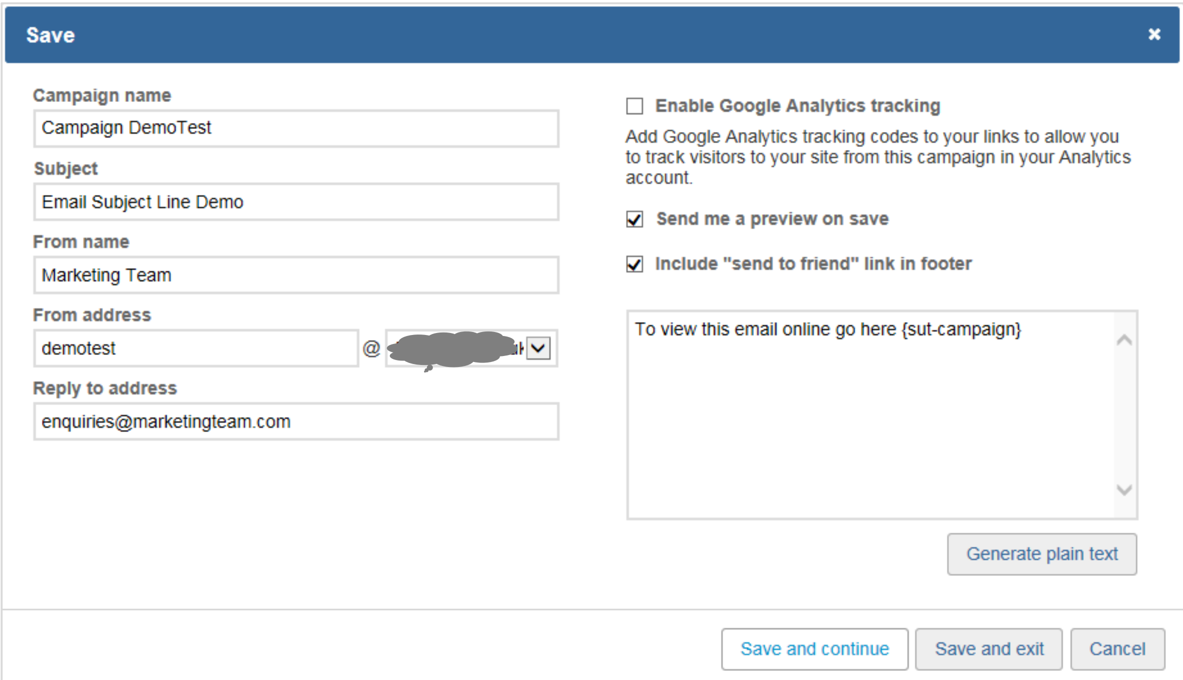
The **User** selects a template for their email message by clicking the relevant icon.



The template then opens in editable form allowing the user to enter text, links and images to build the message.



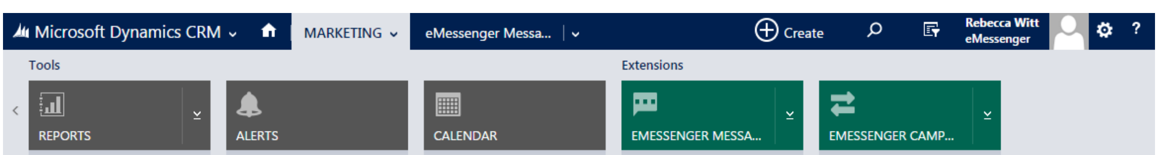
The *Save* window allows the user to set the **Campaign Name**, the **Email subject line**, the **From name** and **address** and **Reply to address** for the campaign.



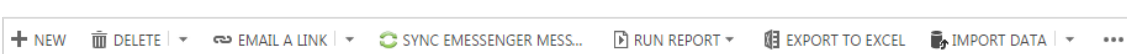
Once the email has been created it can be synchronised across to **CRM** to make it available for sending.

Synchronising Sign-Up.to messages to CRM

From the **Marketing** area of **CRM**, click on **eMessenger Messages**.



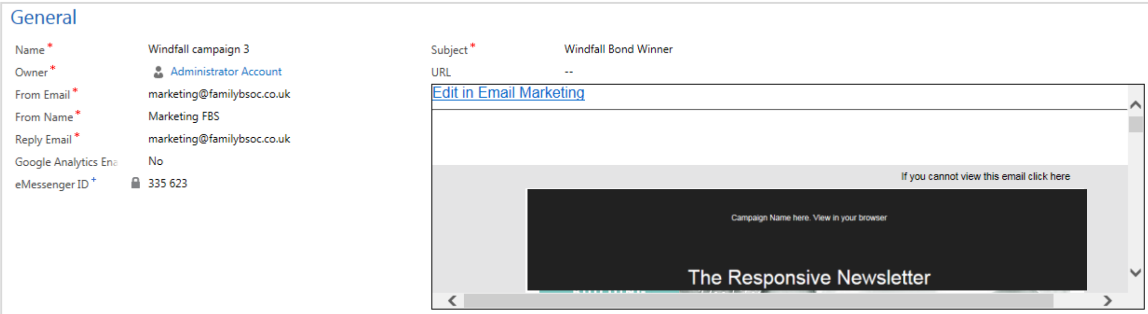
To synchronise all messages, the user simply needs to click the **Sync eMessenger Messages** icon from the toolbar.



To synchronise a specific message, the user can select the message record and then click on the **More commands** ellipsis and choose the **Sync eMessenger Messages** option.

This runs a workflow which synchronises across all data from **Sign-Up.to**. The user will have to confirm that they do wish to run the workflow.

This pulls through a record of each message stored within **Sign-Up.to**.

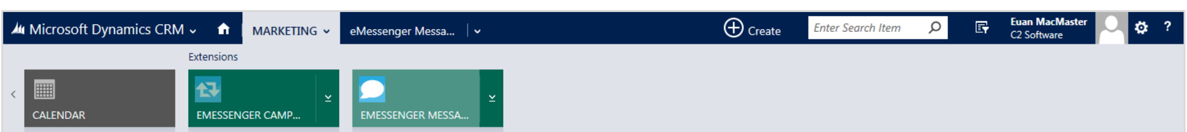


Here, the user can assign a **Name** for the email message, the **From Email** address and **From Name**, the **Reply Email address**, the **Subject Line** for the email and choose whether or not to **Enable Google Analytics**.

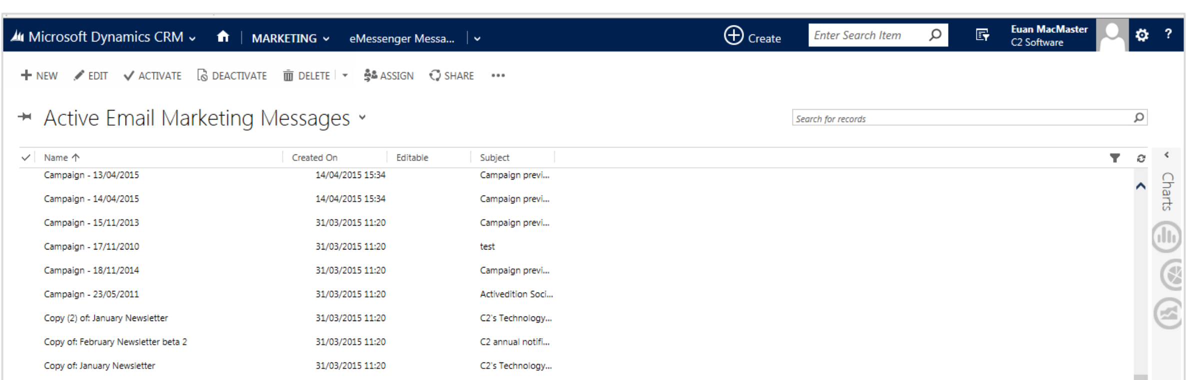
Also available is a link to the email within **Sign-Up.to** where the user can edit the email if required.

Creating the Email Message from another editor of choice

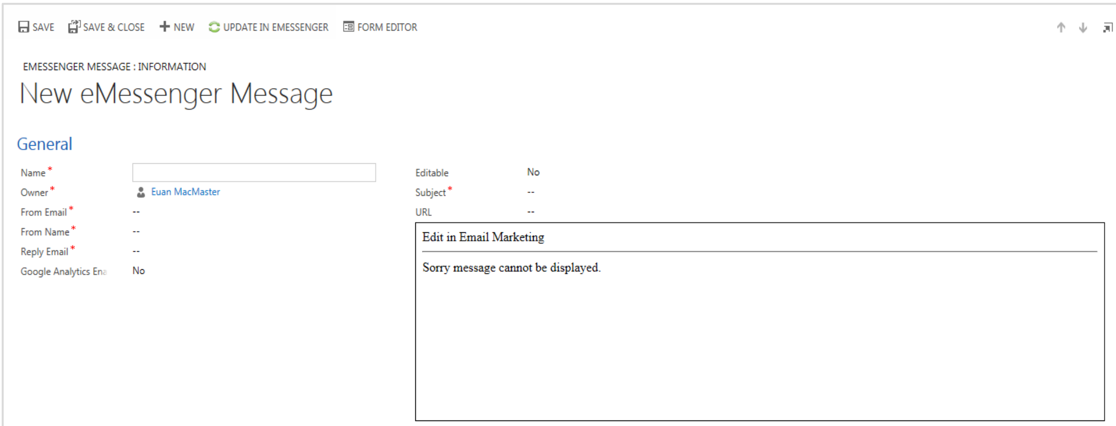
From the **Marketing** area of **CRM**, click on **eMessenger Messages**.



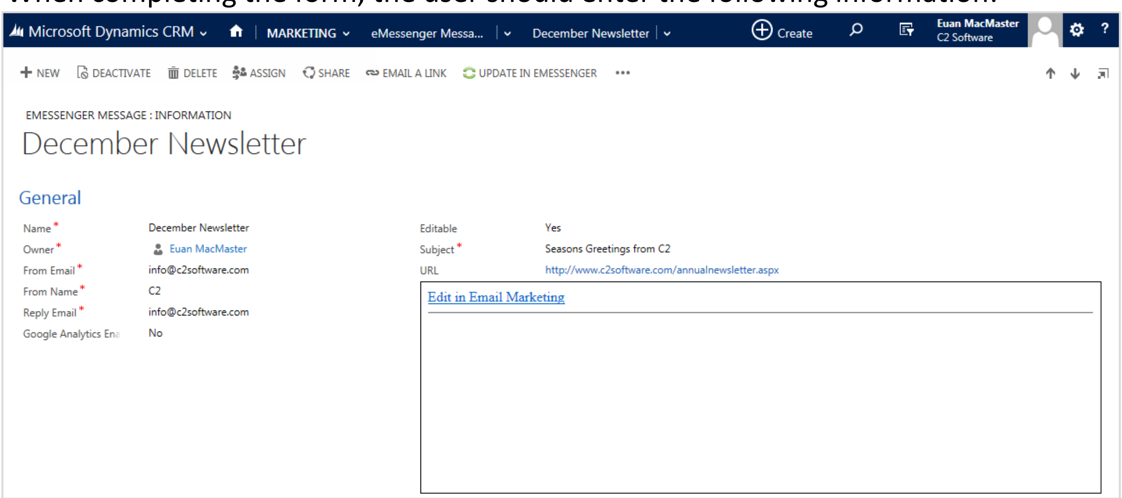
This will generate a list of **Email Marketing Messages**



The user should then click *New* to create a new **eMessenger Message** record 



When completing the form, the user should enter the following information:



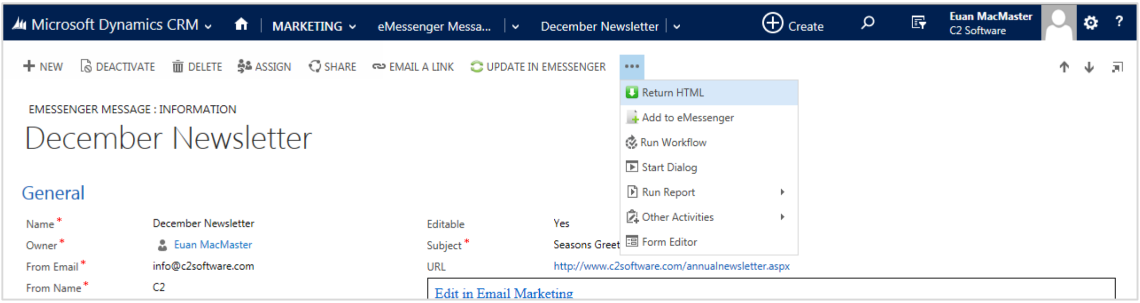
- *Name:* The name of the record
- *From Email:* The email address from which the email should be sent
- *From Name:* The name from which the email should be sent
- *Reply Email:* Reply email address
- *Google Analytics Enabled:* define whether or not Google Analytics should be enabled
- *Editable:* records whether or not the message is editable within eMessenger*
- *Subject:* the subject line of the email
- *URL:* the URL of the email message as created within the 3rd Party tool

The record should then be saved.

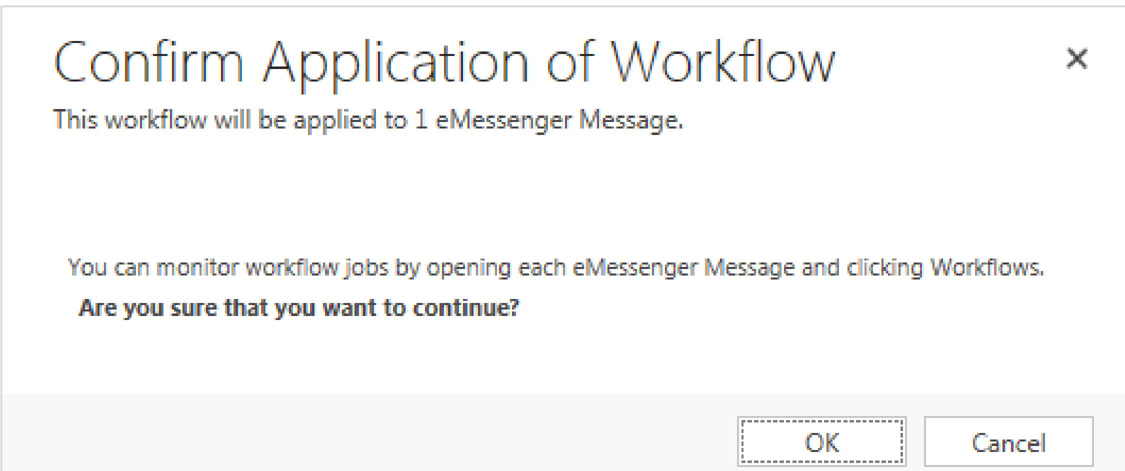
A preview of the email, and the underlying HTML can be retrieved and displayed on the **Email Marketing Message** record by using the **Return HTML** feature of **eMessenger**.

**** The Editable field is not defined by the user. Rather, once a message has been sent from eMessenger it becomes read-only and will be recorded here as a No. It should be noted that while such messages are no longer editable, they can be resent.***

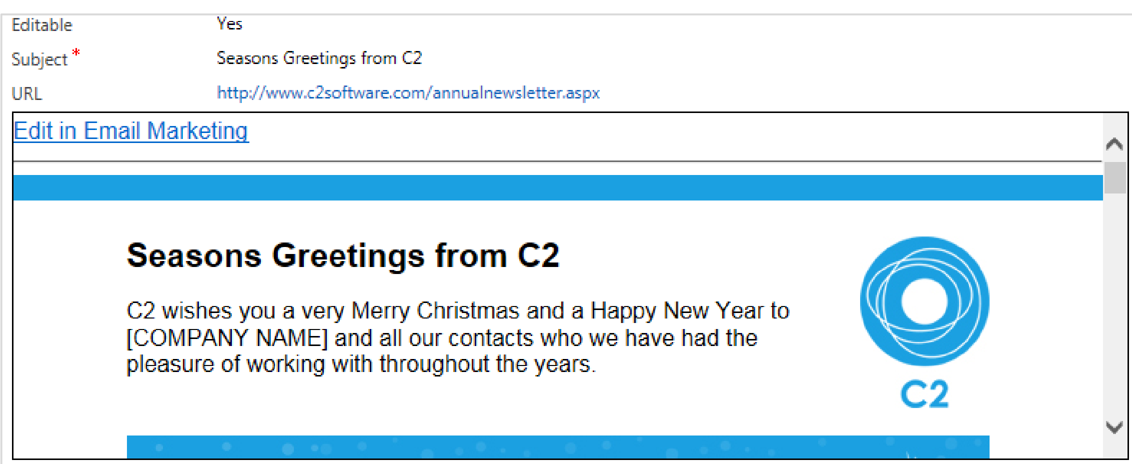
Return HTML is launched by navigating to **More** commands (...) and clicking *Return HTML*



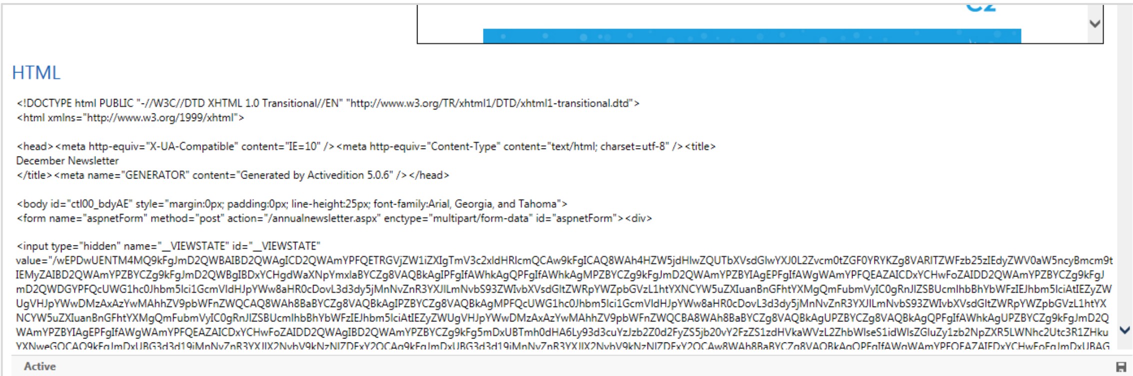
This launches a **CRM** workflow, which the user should confirm.



After refreshing the screen, the user will see a preview of the **eMessenger** message displayed within the **Message** record

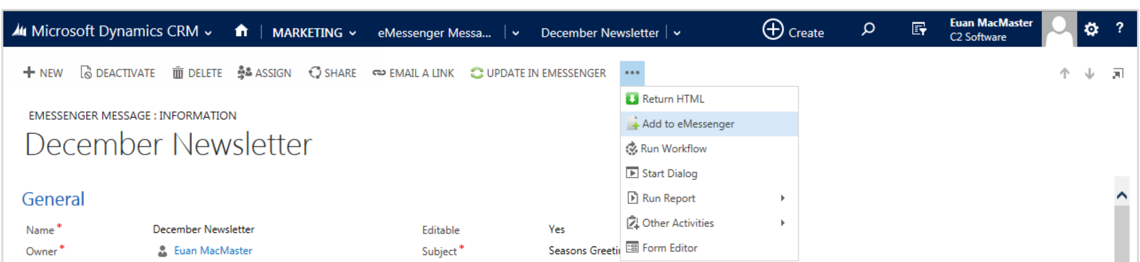


In addition, the underlying HTML is returned to CRM and also displayed on the Message record. This can be viewed by clicking on the HTML section to expand it.



Synchronising 'other' Messages with Sign-Up.to

The new message can be added to eMessenger by clicking the Add to eMessenger icon, found under the More commands (…) icon

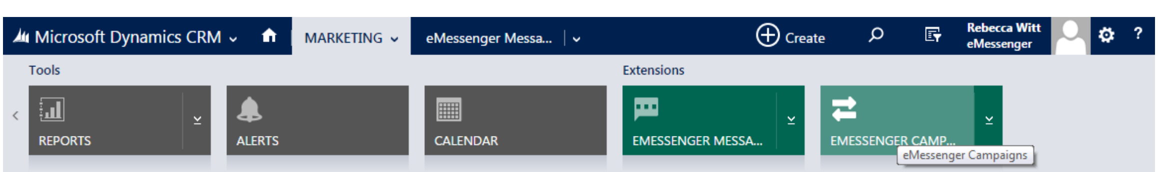


NB If the user is updating a message which has already been sent via eMessenger, the Add to eMessenger option will not be available and is replaced with Update in eMessenger

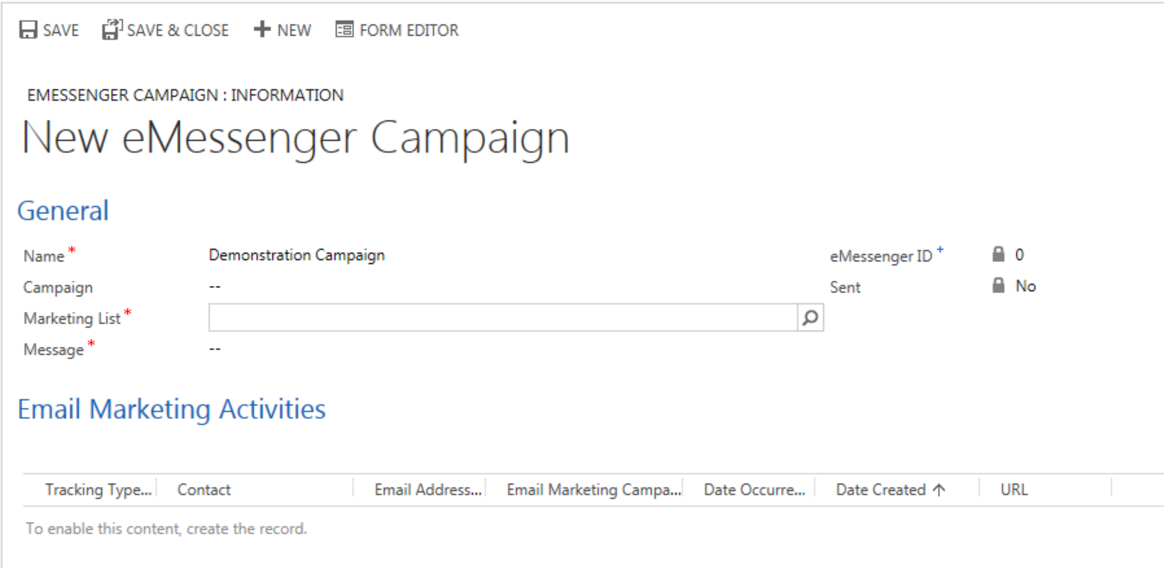
Sending the Campaign via CRM

Now that the CRM has a record of the email Message, a campaign can be quickly and easily created within CRM.

This is done in the eMessenger Campaigns tile, under the Marketing section.

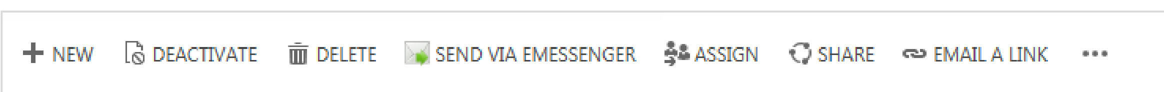


From the resultant screen, click on **New** to create a New campaign.



The campaign can be assigned a name and then the user can select the relevant **Marketing List** to which they wish to send the email, the message they wish to send and then click *Save*.

Once saved, the options in the ribbon bar will update and **the Send via eMessenger** button will become available.



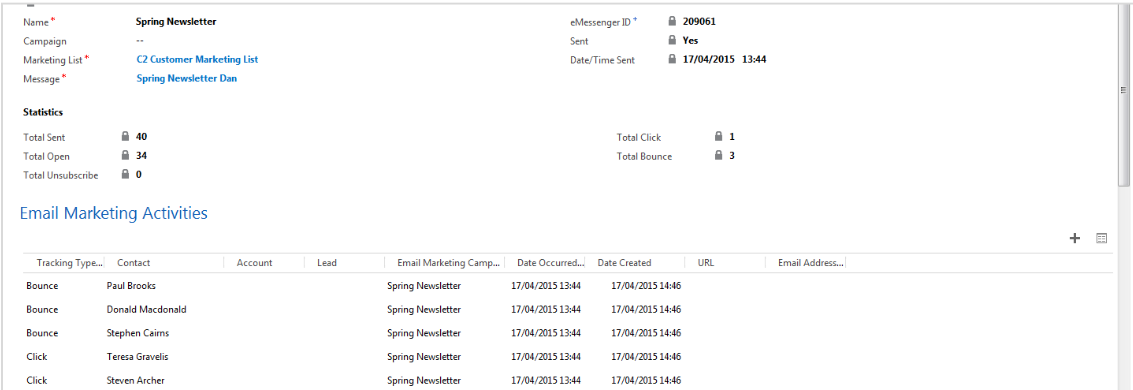
Again, this runs a workflow so the user will have to confirm they wish to continue.

Viewing Statistics in the Campaign Record

Campaign statistics are also returned from eMessenger and can be viewed from within the **eMessenger Campaign** record.

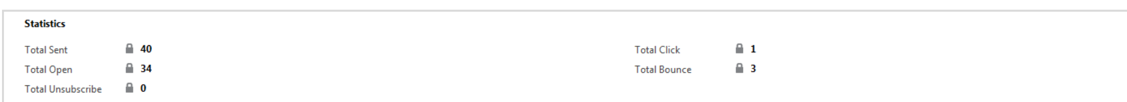
Each interaction with the email is logged as an **Email Marketing Activity** with a defining type. **Email Marketing Activity Types** values are:

- *Sent*
- *Clicked*
- *Opened*
- *Bounced*
- *Unsubscribed*



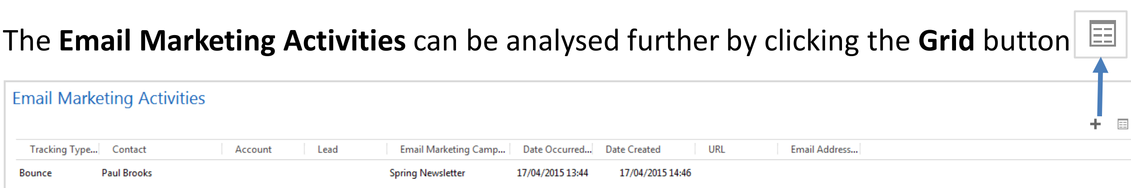
The statistics are logged against the **Campaign** and can be viewed in 2 distinct areas of the form.

The basic statistics (Total number of **Sends**, **Clicks**, **Opens**, **Bounces** and **Unsubscribes**) are displayed together under **Statistics**.

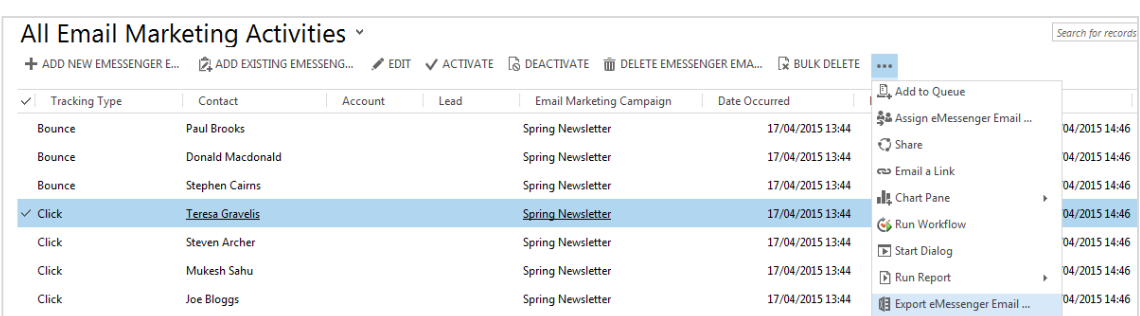


Each Activity is also recorded and displayed under **Email Marketing Activities** and because these interactions are tracked within **Dynamics CRM** the user can make full use of **Dynamics CRM**'s reporting and analysis functions.

The **Email Marketing Activities** can be analysed further by clicking the **Grid** button

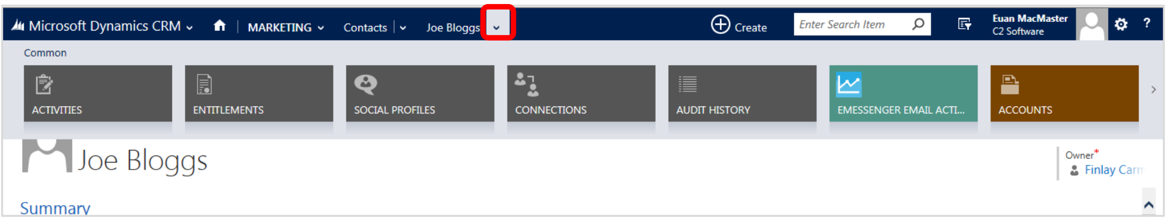


This opens an expanded grid view of the **Activities** allowing users to sort the data, assign it to others, export to Excel and more.

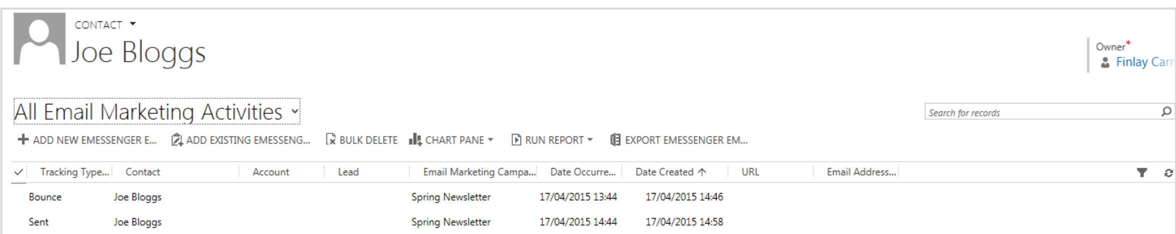


Viewing Statistics from the Contact/Account/Lead Record

As the Email Marketing Activity references the Lead/Contact/Account entity, they can be viewed from those records. This is done by clicking the associated records drop down from the Lead/Contact/Account record and navigating to the eMessenger Email Activities tile



This means that users can view the interactions a particular person or company has made with their campaigns.



One thing to bear in mind regarding Email Marketing Activities is that when an email recipient unsubscribes from a list, the unsubscribe is logged against the email address rather than the entity it relates to.

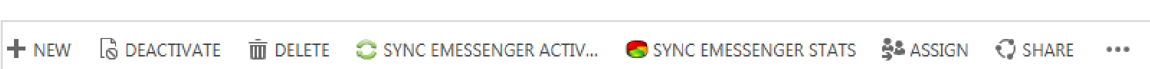
As the email address could conceivably be related to more than one entity (Account, Contact or Lead), a workflow runs which logs the unsubscribe event against each entity to which the email address relates.

Statistics Synchronisation Schedule

When a campaign is sent, the statistics and activities are returned automatically to **CRM** on the following schedule:

- Every 4 hours for the first 24 hours after sending
- Again after another 24 hours
- Once more after another 24 hours

Should it be necessary to return statistics or activities outwith this schedule, they can be manually returned using the relevant icons on the **eMessenger Campaign** record.



We thank you for your interest in eMessenger and hope you found this guide useful. If you would like any more information, or to discuss any of our other services, please contact us on +44(0)1382 723040 or email info@c2software.com

We also cover many CRM and eMessenger related topics in our blog, available from http://www.c2software.com/c2-blog or check out our catalogue of helpful and informative tutorial videos on our YouTube channel: https://www.youtube.com/channel/UCENHCItxkU69zV5s8roOs0g