POWER OBJECTS

USER GUIDE

PowerMailChimp

CRM 2013

Service Support Education Add-ons

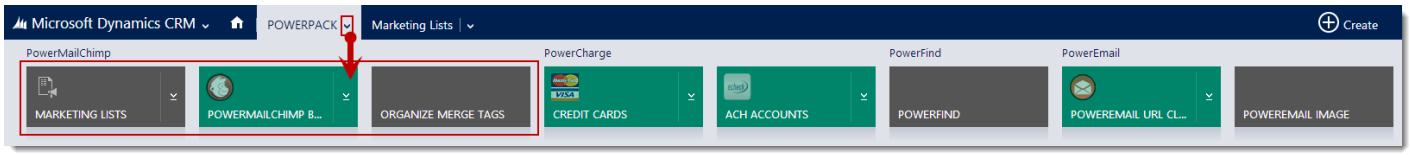
Contents

About PowerMailChimp

PowerMailChimp integrates the robust email template functionality of MailChimp with the customer relationship management power of Microsoft Dynamics CRM. PowerMailChimp allows you to send MailChimp email blasts right from CRM using your existing Dynamics CRM accounts, contacts, and leads. You will create your email templates within MailChimp, create your marketing lists in CRM, and track your results within Dynamics CRM so that you are managing your customer relationships in one central place. That's the power of Microsoft Dynamics CRM and PowerMailChimp! Should you have questions at any time, please email powerpackpro@powerobjects.com.

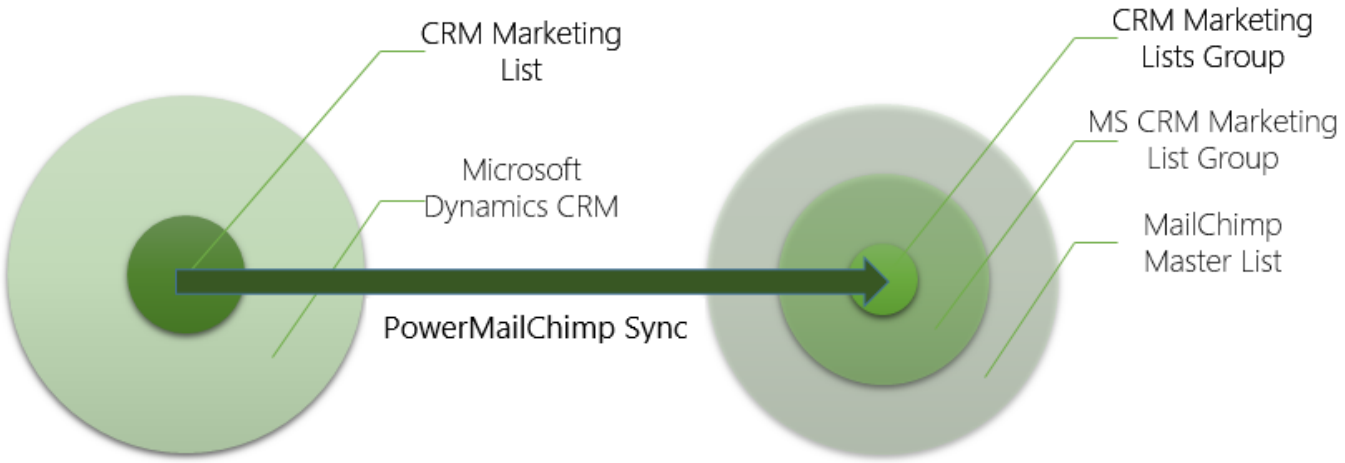
Navigating to PowerMailChimp

Once you have imported PowerMailChimp in Dynamics CRM, you will see a new set of options under the PowerPack section in the command bar. If you do not see these options, refresh your browser. If you are using the Outlook client, close and reopen Outlook.

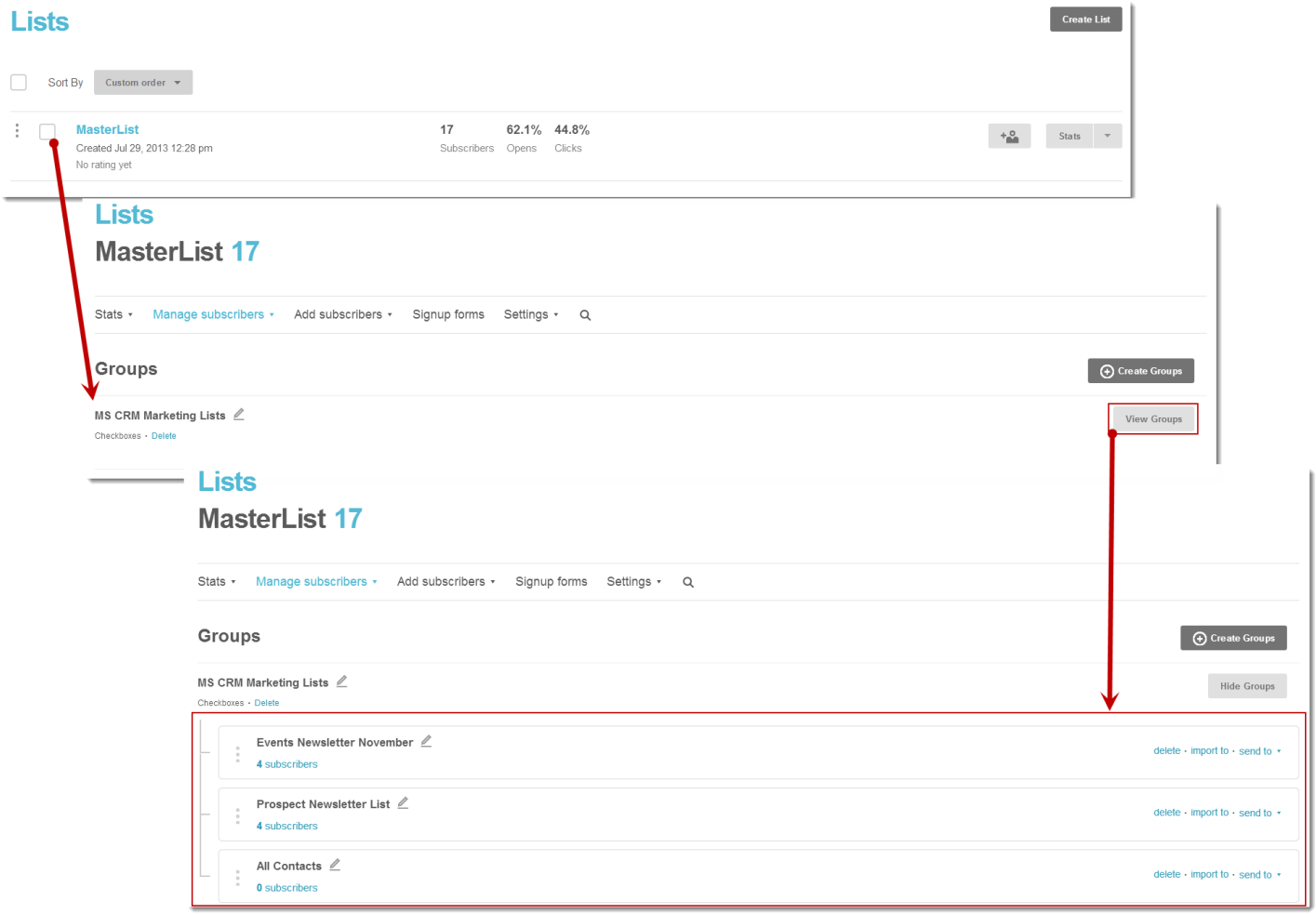


Dynamics CRM Marketing Lists and MailChimp Groups

The first thing you need to understand is the relationship between Dynamics CRM Marketing Lists and the MailChimp Groups. (If you already have a MailChimp account and you're just starting to use PowerMailChimp, click here for more information on how to get started.) Best practice for MailChimp is to create one Master List, then with each initial sync of a CRM Marketing List, a group will be created under a subgroup within the Master List to segment the data. In Dynamics CRM, a marketing list will translate into a group within a MailChimp Group, called MS CRM Marketing Lists, within the MailChimp Master List.



Note: *You will need to create your Master List in MailChimp before you can sync a Dynamics CRM Marketing List to it.*

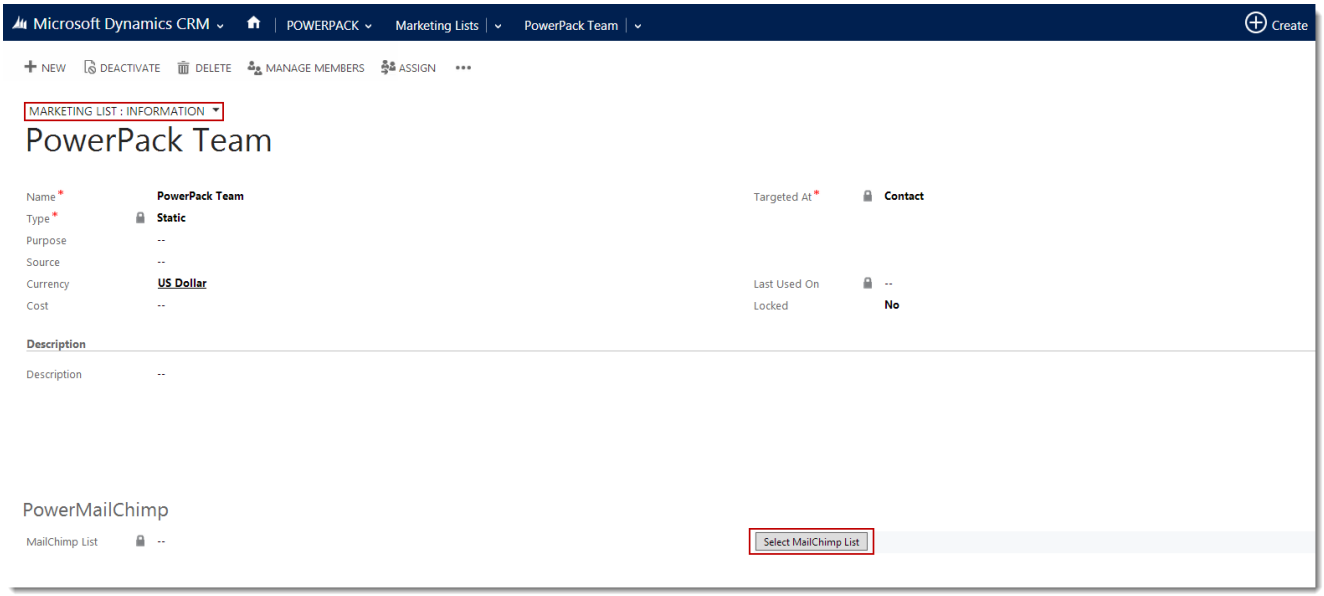


Note: *You cannot have more than 60 groups in MailChimp at one time. In other words, you cannot sync more than 60 CRM Marketing Lists under one Master List in MailChimp.*

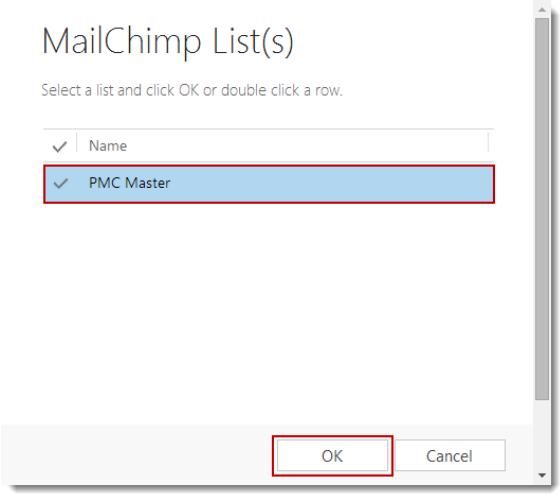
Existing CRM Marketing Lists

When you first start using PowerMailChimp, you can use existing or create new Dynamics CRM Marketing lists (either static or dynamic), for pre-existing CRM Marketing Lists follow the steps below:

1. Within the CRM Marketing List record, make sure you are viewing on the information form, click the Select MailChimp List button



2. Highlight the appropriate MailChimp Master List and click OK



3. After selecting Ok in the dialog box, the MailChimp list will be populated, after saving the record, the 'Sync Now' button under the ellipsis will become available to you.
4. After selecting the sync now button a dialog box will open letting you know that the sync has started. Once the marketing list is sync'd to your MailChimp account, the "PowerPack Team" will become a sub-group within the MS CRM Marketing Lists group.

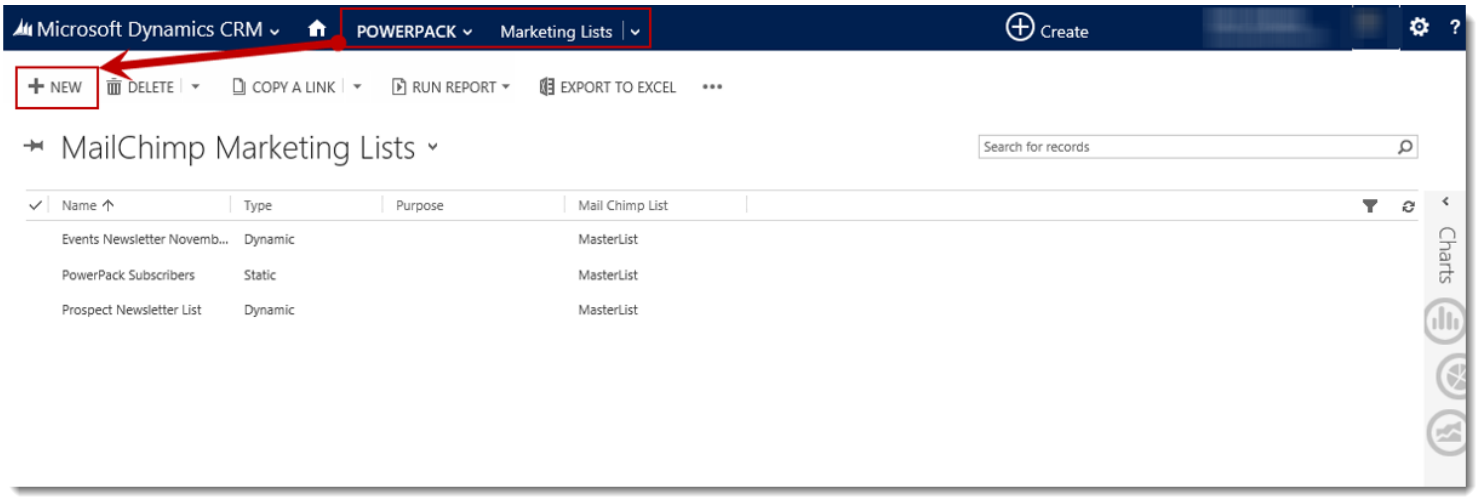
Note: *an initial sync only needs to happen once. You are free to manually sync as many times as you would like, however during the PowerMailChimp Blast process PowerMailChimp will automatically sync the selected CRM Marketing List(s) that are associated to the blast, so that the marketing list data is current.*

5. If you navigate to your MailChimp account you will see that the CRM Marketing List has been added as a group under the *MS CRM Marketing Lists* group with the designated MailChimp Master List.

Creating a new CRM Marketing List

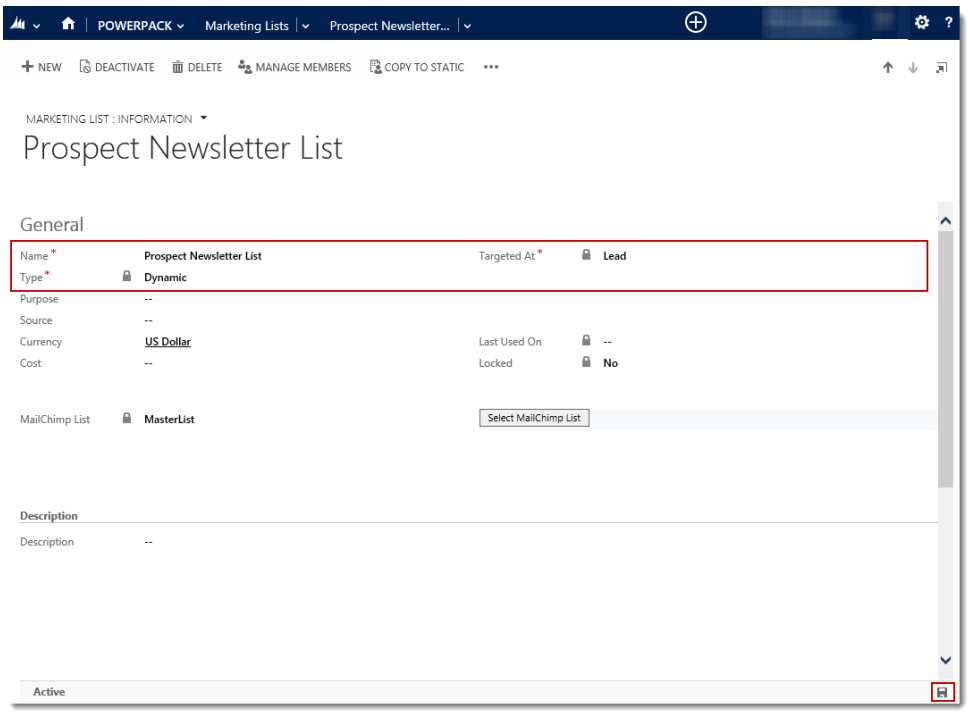
With PowerMailChimp Blast you also have the ability to create new CRM Marketing lists right from the PowerMailChimp section (under the PowerPack tab). The process is the same as creating any other marketing list in CRM, the only extra step in creating a CRM Marketing list is to associate the new list with the Master MailChimp list:

1. Navigate to the PowerPack section, select Marketing Lists and select 'New' in the upper left corner.

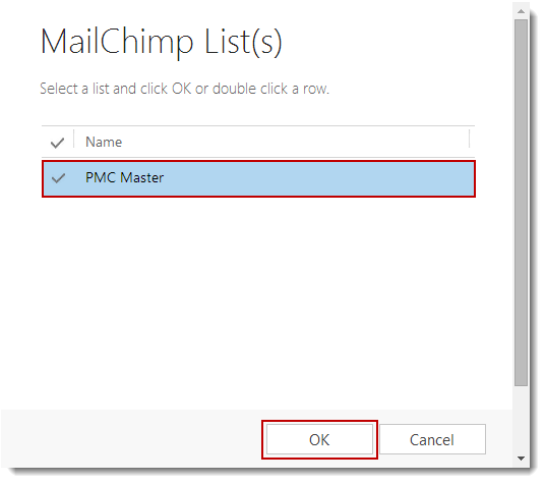


Note: *You are creating a standard CRM Marketing list that will be available within CRM Campaigns, as well as MailChimp. Your list can be static or dynamic, and can be made out of contacts, leads or accounts.*

See your CRM Administrator for information about adding and removing members to a CRM Marketing List.



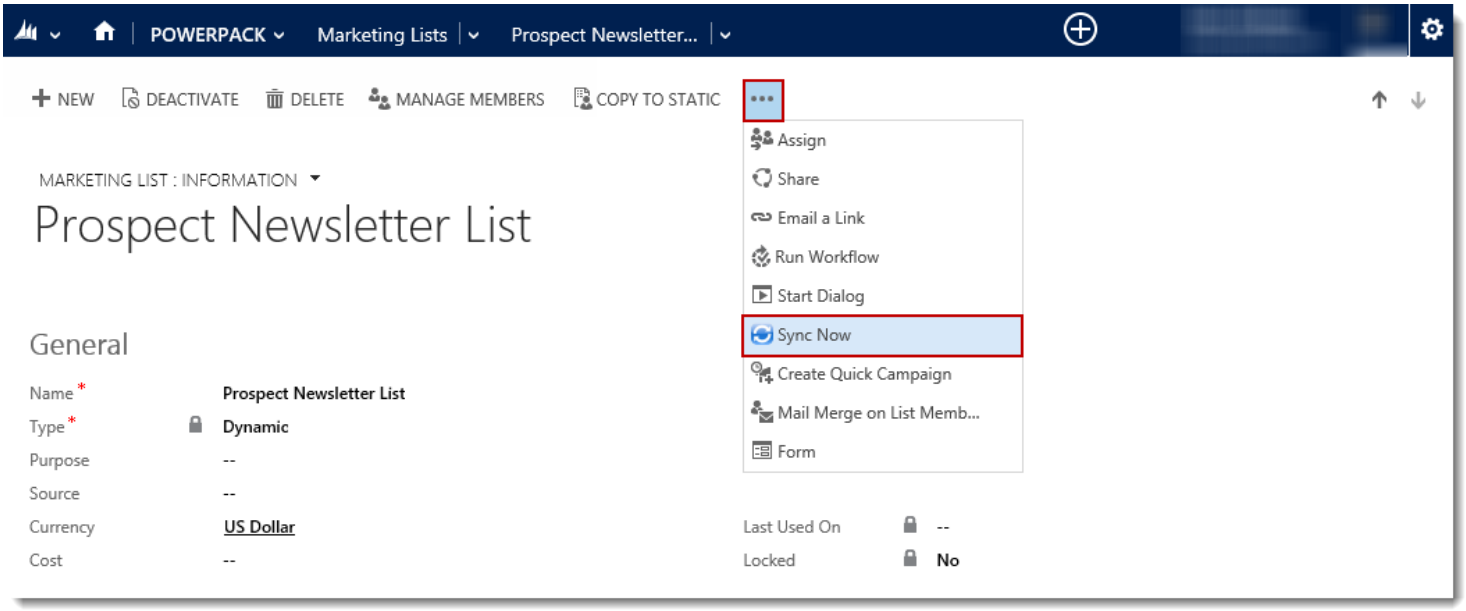
2. Fill in the Required Fields (marked with *)
    - Name: the name of the Marketing List you are creating
    - Targeted At: what type of member is this? (Account, Contact, Lead)
    - Type: Static vs. Dynamic
        - Static: Select if using the list once. Members in a static marketing list will change only when you manually add or remove members
        - Dynamics: Select when using the list multiple times. The records being queried by a dynamic list will update based on the data fields in their record
3. Next select the MailChimp List you want to sync this CRM Marketing List to and save the record.



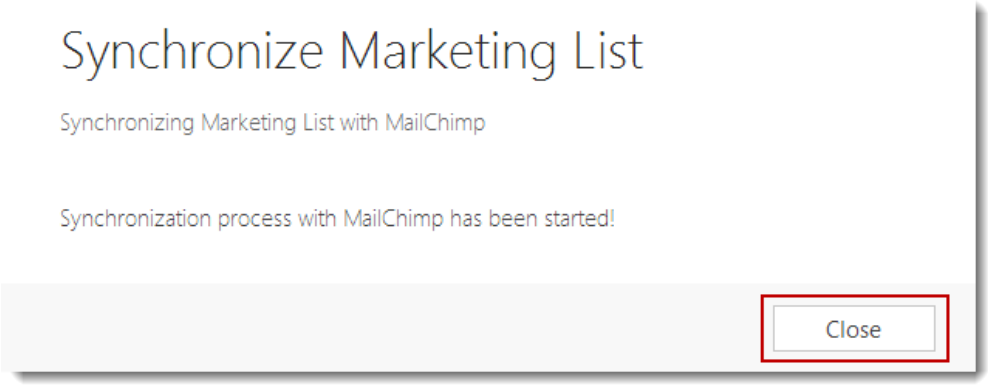
4. After saving, the 'Sync Now' button will become available under the ellipsis. You only need to do this step once per existing CRM Marketing list. You can now 'Save & Close" the CRM Marketing List.

PowerMailChimp Manual Syncing

If you add someone new to your Marketing List, the 'Sync Now' button will allow you to synchronize your marketing list with your MailChimp list instantly. Simply select 'Sync Now' from the ellipsis dropdown and let the sync run.



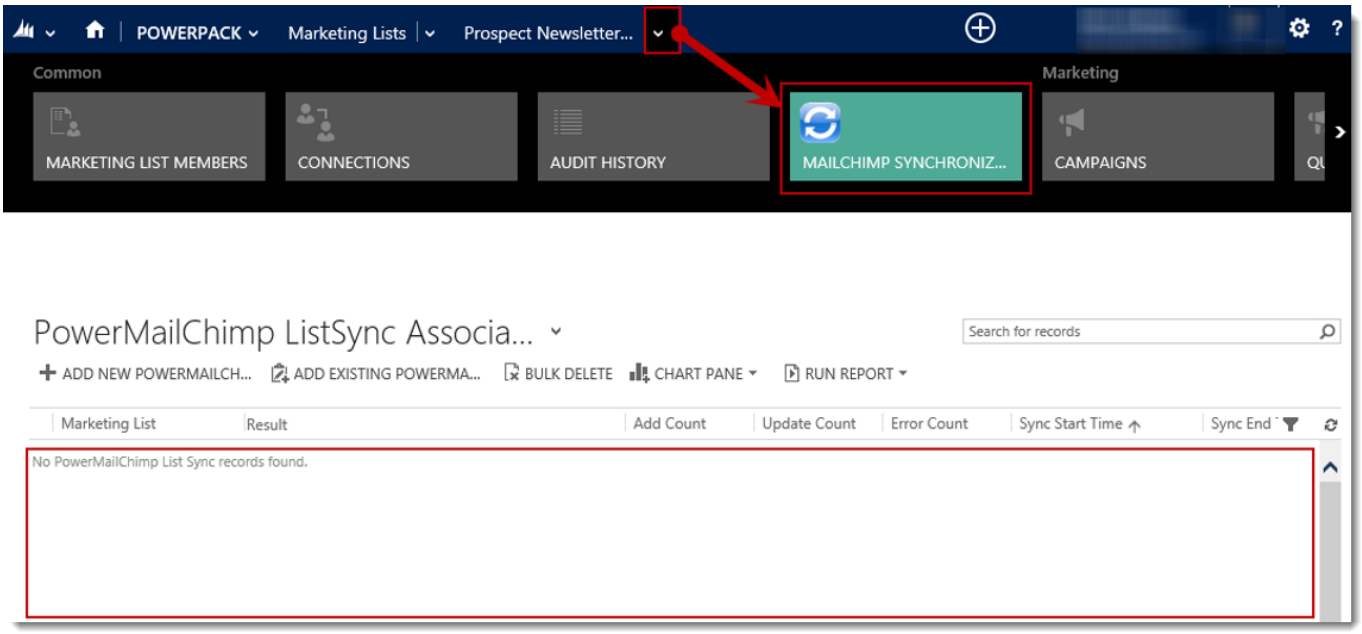
After selecting 'Sync Now' a dialog box will open, letting you know the sync has started



Note: *If you change the name of your Microsoft Dynamics CRM Marketing List after originally syncing it with your MailChimp account, a new group will be created with the new marketing list name, and you will see two groups in MailChimp: one with the original marketing list name and one with the new marketing list name.*

PowerMailChimp Synchronized

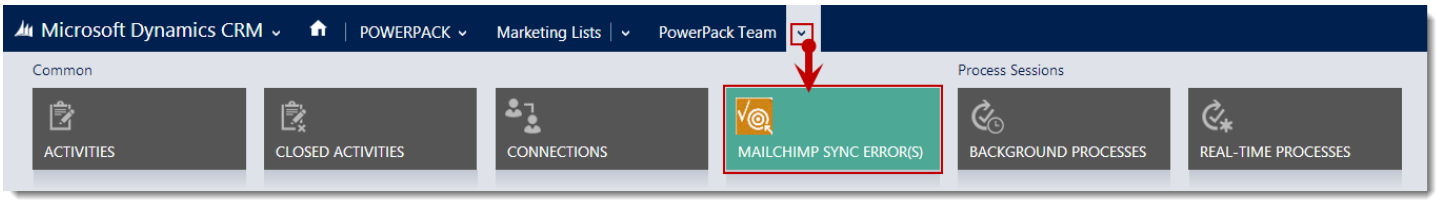
Once you have sync'd a CRM Marketing list with your MailChimp Master List, you will notice the 'MailChimp Synchronized' section will appear under the sub-menu for your marketing list.

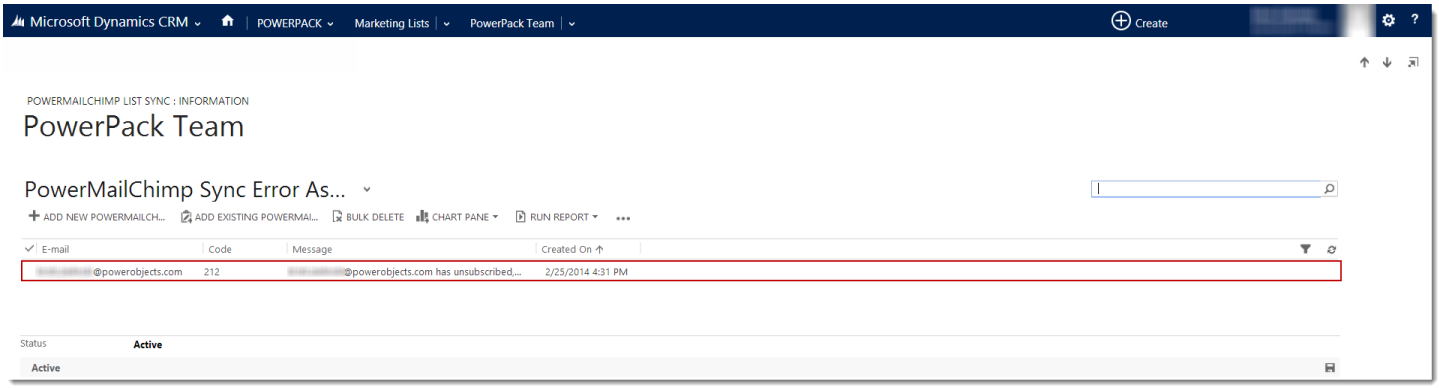


In the MailChimp Synchronized section you will find a record of every sync you have ever initiated. This area will tell you the dates of sync and how many subscribers were added, updated and if there were any errors.

MailChimp Sync Errors

If you have an error on the sync record, you can open that individual sync record and check why there was an error with the sync. Once you select the individual sync record a new window will open where you can select MailChimp Sync Error(s) from the command bar.





Remember, sync errors are not necessarily a bad thing. Errors could be that someone has unsubscribed and cannot be added back to the list or an email has bounced too many times and cannot be added back. However, if you see an error in the results column that you do not understand, please feel free to email powerpackpro@powerobjects.com.

Note: *You do not have to sync marketing lists every time you are going to send a PowerMailChimp blast from your CRM system. Marketing lists included in the blast are automatically synched before the MailChimp Blast ID is created. A "MailChimp Synchronized" record will be created whether the list has been synced manually or automatically.*

If for some reason your Synchronization gets stuck, meaning you've clicked Sync Now, the process has started, but the process never completed, simply delete the Sync record, and click "Sync Now" again. However, remember to be patient, if the marketing list has a large number of members the sync will take longer.

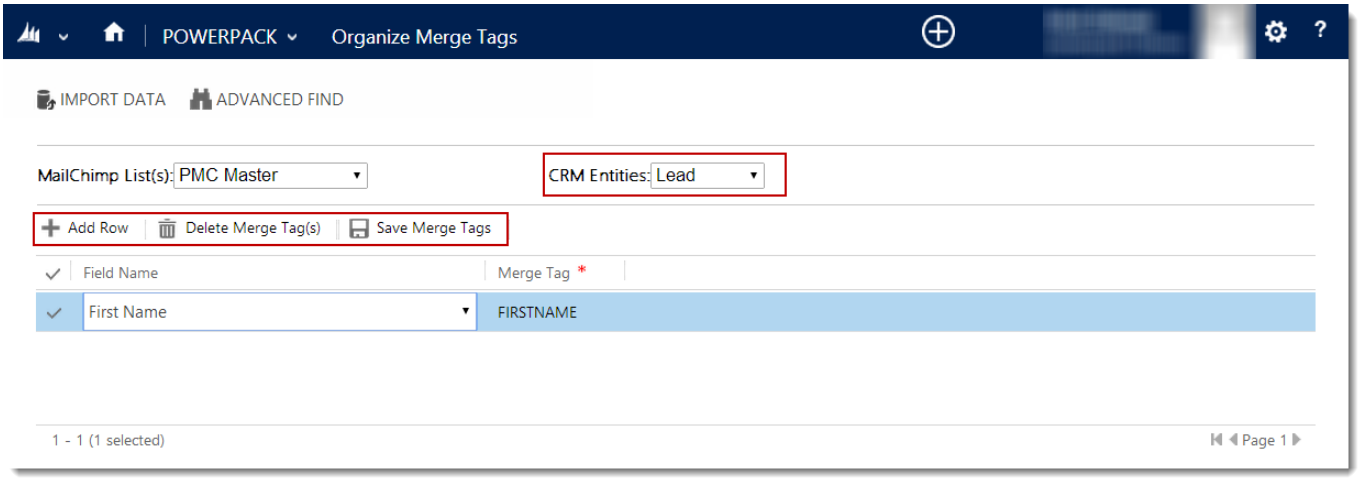
PowerMailChimp Merge Tags

Merge tags are a great way to pull information from the CRM and transfer it into MailChimp templates. Merge tags can be used to create dynamic content in MailChimp templates, such as account numbers, birthdates, or other information.

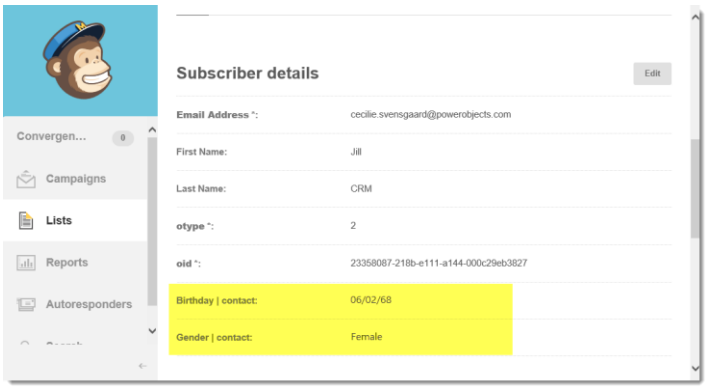
To set up merge tags, navigate in the command bar navigate to PowerPack and select Organize Merge Tags, then select the entity you would like to customize merge tags for: Account, Contact or Lead. Remember, you will have to set up merge tags for each of these entities individually in order for that information to get sync'd with MailChimp. Don't forget to click Save after organizing your merge tags for each of the different entities.

To use one of these merge tags in your MailChimp template, you would type *|name of merge tag|*. So, for example, if you wanted to use the First Name merge tag in the screenshot below, you would type *|FIRSTNAME|*

This is what you will see in the CRM:



...and this is what it will look like in MailChimp:



Note: *If you are syncing a time/date field, be sure that MailChimp and the CRM are in the same time zone. Also, please note that you cannot have more than 30 merge fields in MailChimp at one time. Also, the "otype" and "oid" merge fields are automatically created for each contact/lead/account that is synced over to MailChimp. This is used for PowerMailChimp, so that we can sync statistics back to the correct person in CRM.*

To learn how to set-up conditional merge tags in your MailChimp template, click here.

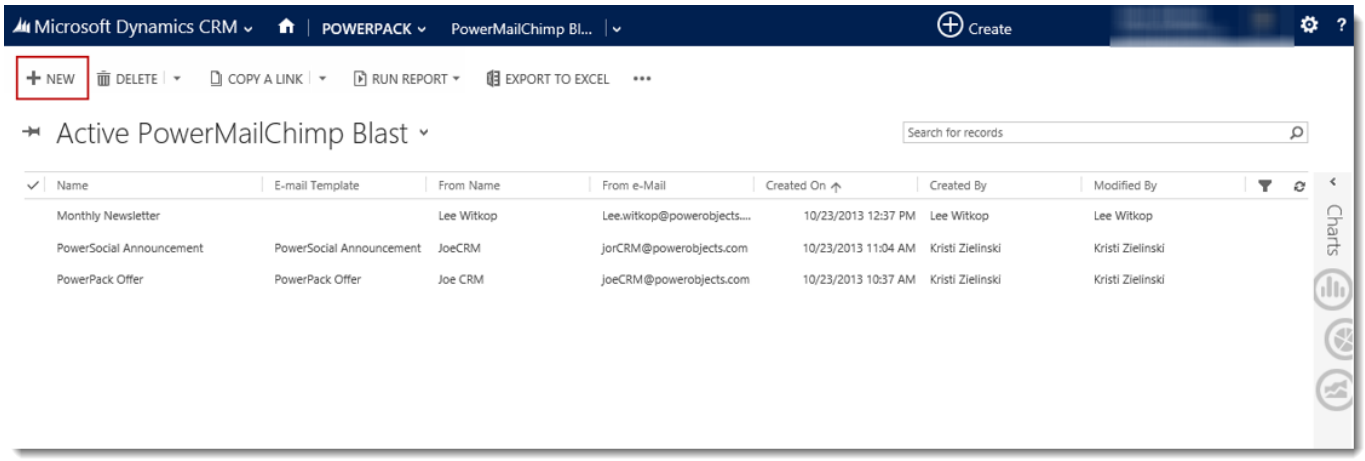
PowerMailChimp Blast

A PowerMailChimp Blast is a record that you must create to send a bulk email, all of the overall statistics of your email blast will be collected in this record. Also note that this record becomes read-only after sending and cannot be reused.

Note: *Before creating a PowerMailChimp blast you must create an email template in your MailChimp account. If you need help designing a MailChimp template, please refer to MailChimp.*

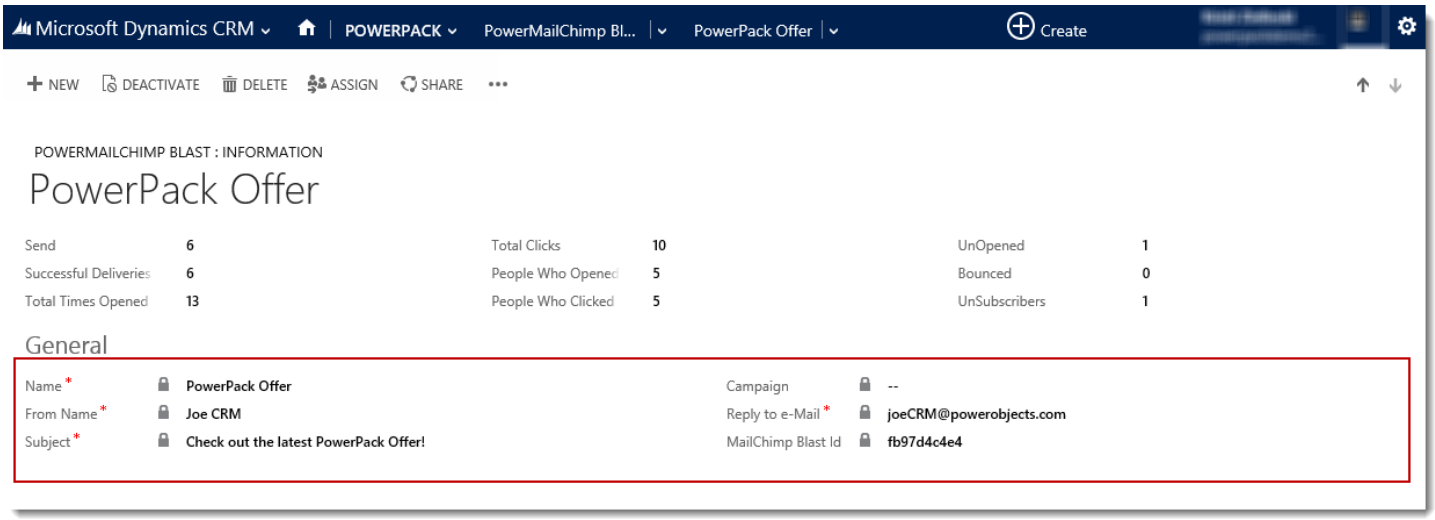
Create a PowerMailChimp Blast

Creating a PowerMailChimp Blast is quick and easy. First, navigate to PowerPack then PowerMailChimp Blast in the command bar. Click on New in the upper left-hand corner and a new form will be created.



General Tab

Fill in the general tab information and click on Save in the lower right corner. You must save the PowerMailChimp Blast before you can associate a marketing list to it.



Name

This is a required field and is the internal name of the PowerMailChimp Blast in Microsoft Dynamics CRM and will be reflected as the campaign name in MailChimp This should be a somewhat logical name as you will most likely need to come back and reference it in the future. The name field does not allow the use of special characters. Alpha or numeric characters.

From Name

Each PowerMailChimp Blast requires a "From Name," this is who the email is from when the recipient views it.

Subject

This is the subject of the email being sent and will be in the subject line of the email when it is received.

Campaign

If desired, you can associate your PowerMailChimp Blasts to a Dynamics CRM Campaign.

Reply to email

This is the email address that will be used when a recipient chooses to Reply to the email. Best practice would be to use a generic email address rather than an individual's email address (ex. marketing@powerobjects.com)

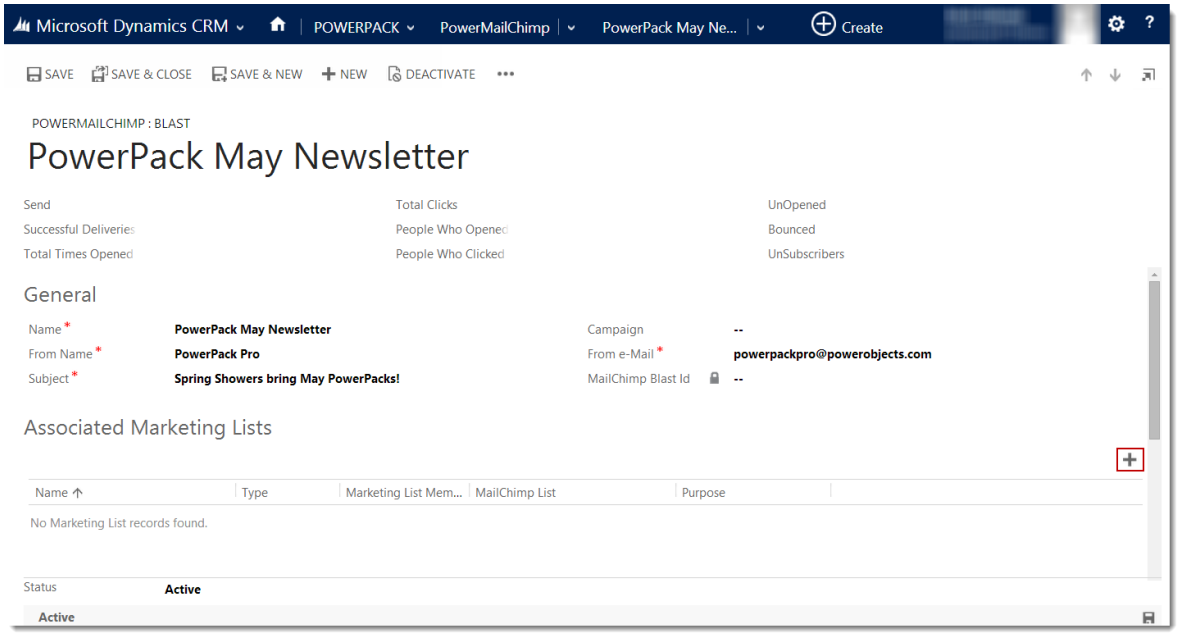
MailChimp Blast ID

A unique ID will automatically be populated by MailChimp when the PowerMailChimp Blast is completed and saved. The MailChimp Blast ID signifies that the PowerMailChimp blast is ready to be sent. If you do NOT get a MailChimp Blast ID, something isn't quite right and you will be unable to send your blast. Additionally, before a Blast ID is created, the solution will automatically sync your marketing list one last time to ensure data is up-to-date in MailChimp.

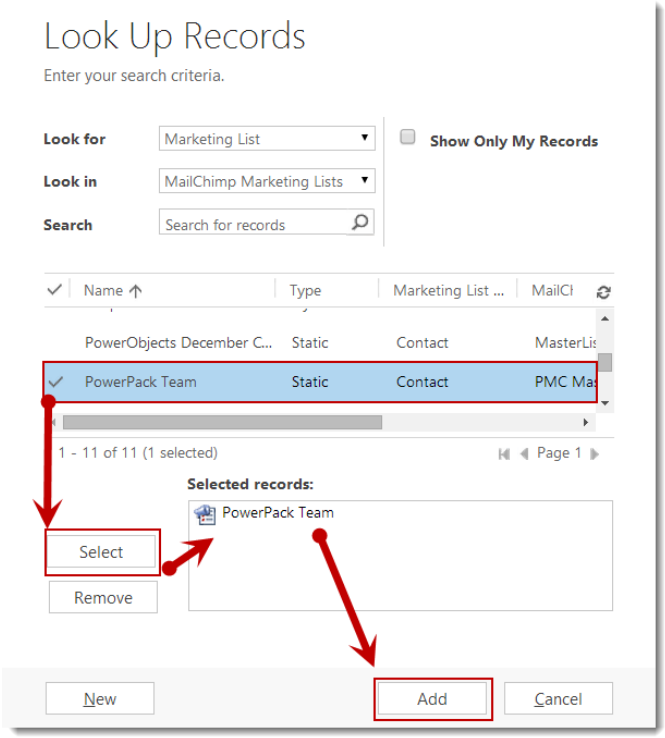
Associated Marketing List Tab

Once you have saved the PowerMailChimp Blast, you can add CRM Marketing lists to which the email will be sent.

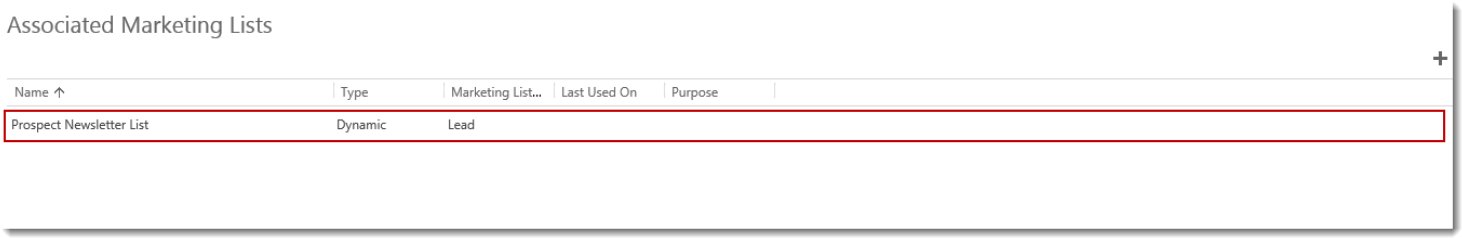
1. Click the '+' to the right of the Associated Marketing Lists section title and a search box will appear. If you do not get this option, please try saving the blast and try again.



2. Select the list(s) that you want this PowerMailChimp Blast email sent to.



3. Once selected you will be able to see the chosen Marketing List(s) in the Associated Marketing Lists grid.

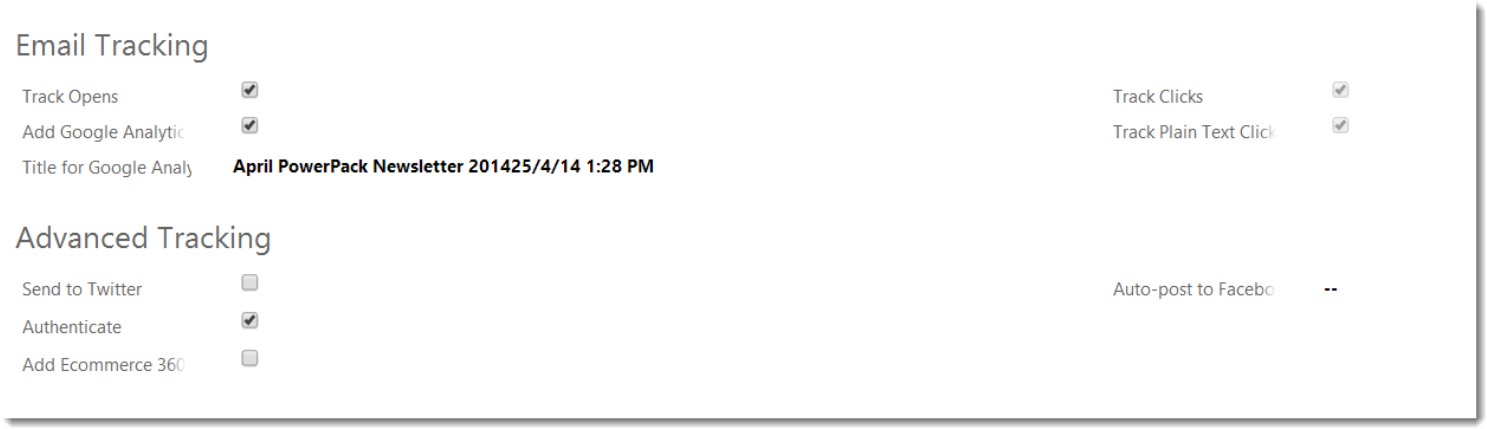


Please Note: *if you are using more than one marketing list in your PowerMailChimp blast, those lists cannot be sync'd to two different master lists in MailChimp. All marketing lists that you are trying to use in a PowerMailChimp blast must be sync'd to the same master list in MailChimp.*

Email Tracking and Advanced Tracking

This section directly relates to what data MailChimp will track and report on after the email blast is sent. Send, open, click, bounce, and unsubscribe statistics will automatically be written back to CRM. Turning on the Email Tracking or Advanced tracking options in CRM will turn them on in MailChimp for this specific email blast being sent.

The default options are checked and will remain checked. The remaining options can be turned on based on your needs. For more information on these additional tracking capabilities please refer to MailChimp.



Track Opens

Checking this box will track how many people open your email, by default this box is checked.

Track Clicks

Checking this box will track how many people clicked on various links in your email, which links were clicked and how many times; this box is check by default.

Add Google Analytics Tracking to all URLs

If you are using Google Analytics to monitor your site traffic, you might want to use this feature to see what people are doing on your site once they click a link in your email.

- You will want to make sure that you have your Google Analytics account setup on your website and that it is setup to track conversations

Title for Google Analytics

This is the title that will show up on your Google Analytics site to help you identify which email blast the statistics are coming from, if you check the "Add Google Analytics" box this field will automatically populate based on date and PowerMailChimp blast name.

Track Plain Text Clicks

Track how many people clicked on links in your plain text email, which links they clicked on and how many times, this is checked by default.

Send to Twitter

If you have linked your MailChimp account to a Twitter account, checking this box will automatically generate a tweet of the email message for people to visit on the web.

Authenticate

Authentication acts like a license plate for your email. It provides a traceable identifier which indicates you are probably legitimate, helping you avoid spam filters.

Add eCommerce 360 Tracking on all URLs

Track when people click from your email blast, visit your website all the way to purchase (even tracks ROI).

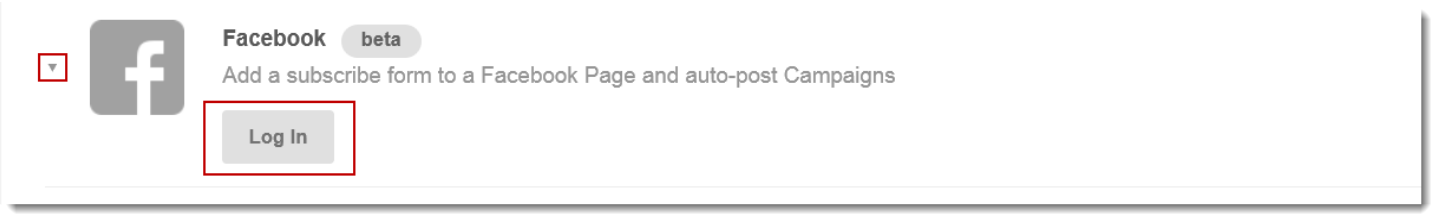
- To use this feature, you must first sync your MailChimp API with your eCommerce shopping cart solution.

Post to Facebook

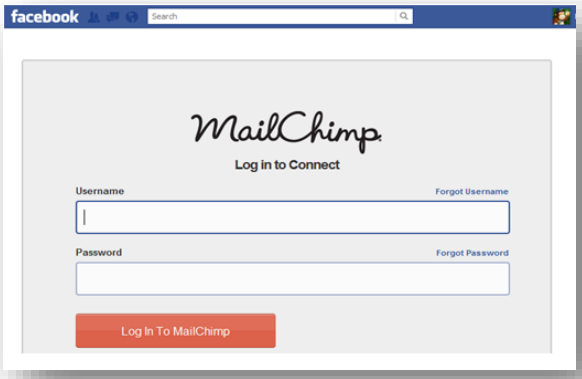
This feature allows you to post your MailChimp blast email directly to your Facebook account.

To post your PowerMailChimp Blast to Facebook, you need to follow a few simple steps to integrate MailChimp and Facebook.

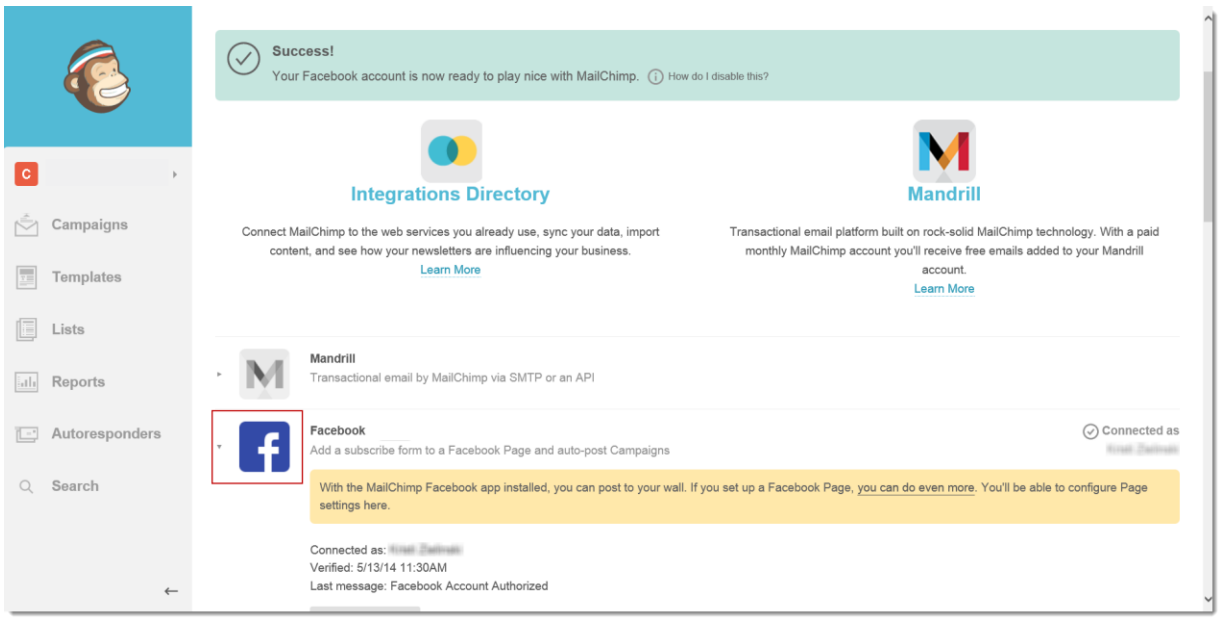
1. In MailChimp go to Account Settings > Extras > Integrations:
2. Expand the Facebook section and click on "Log In"



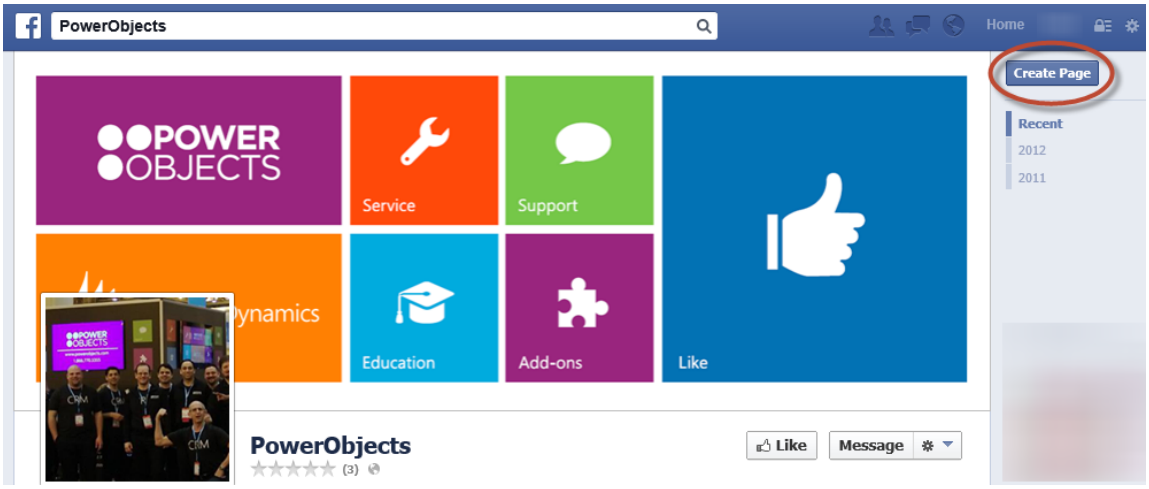
3. This will prompt your Facebook login, please make sure you are logging into the correct Facebook account that you want to auto-post your PowerMailChimp Blasts to. You will be prompted to allow Facebook to have access to your MailChimp account, you must allow this to be able to sync the two programs.

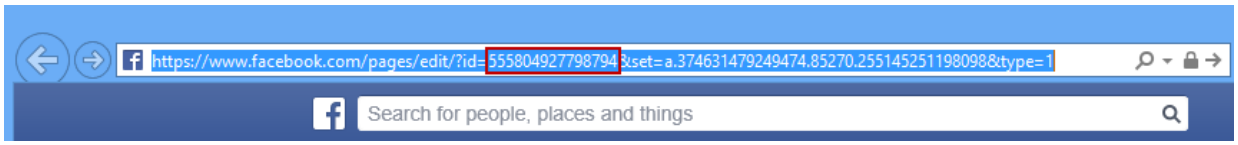


4. You will see the connection status in MailChimp's Facebook settings changes from grey to full color when the connection has been established. *If the connection shows as greyed out, it did not connect the two accounts, and your will need to refer to MailChimp for more information on why it is not connecting.*



5. In your Dynamics CRM PowerMailChimp Blast you need to provide the Facebook Page ID for the page(s) that you want to post your specific email blast to. You can post to more than one Facebook page at a time as long as you provide the Facebook page ID for each page, putting each ID on a separate line in the multi-line text box on the PowerMailChimp Blast.
6. To locate the Facebook Page ID navigate to the Facebook page and select "Edit Page," in the upper right corner. In the browser, look at the URL and copy the Page ID. This is the number sequence listed after "?id="





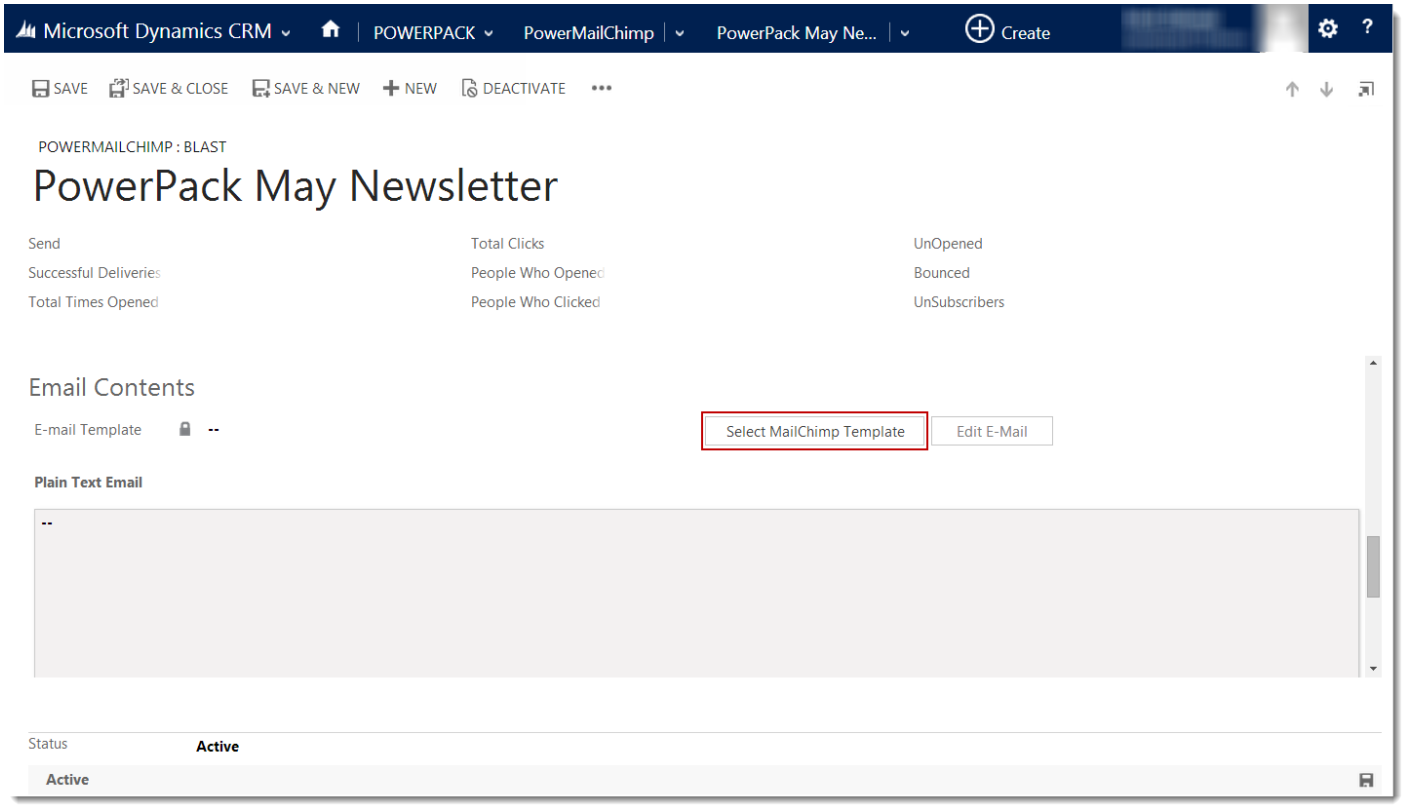
7. Be sure to Save the PowerMailChimp Blast after you enter the Page ID(s).

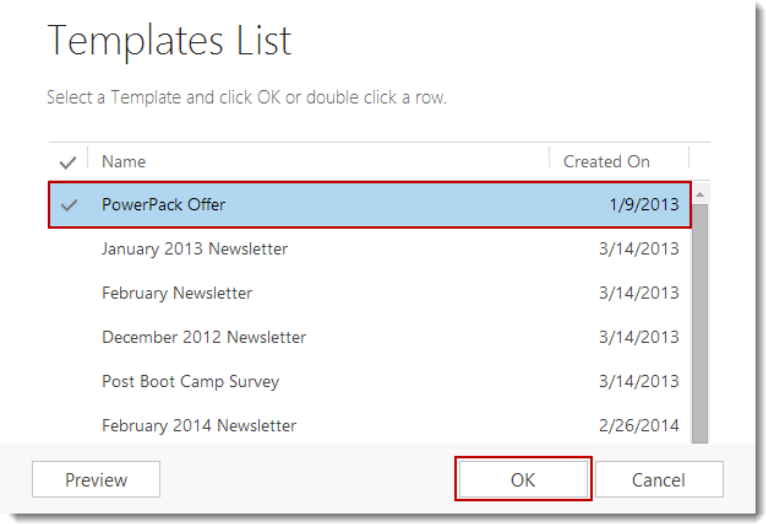
Select MailChimp Template

The last step in setting up a new PowerMailChimp Blast is to choose the MailChimp email template that you want to send.

Please refer to the MailChimp website for further information about creating email templates.

First, click on 'Select MailChimp Template,' then select the appropriate template from the MailChimp template list. You can preview the template by clicking 'preview' in the dialog box. After you have selected your template select OK.





After selecting a MailChimp template you will see the Plain Text version of that email template that will be used if the recipient has choose to receive plain text email. This plain-text version is automatically generated, based on the content in your MailChimp template.

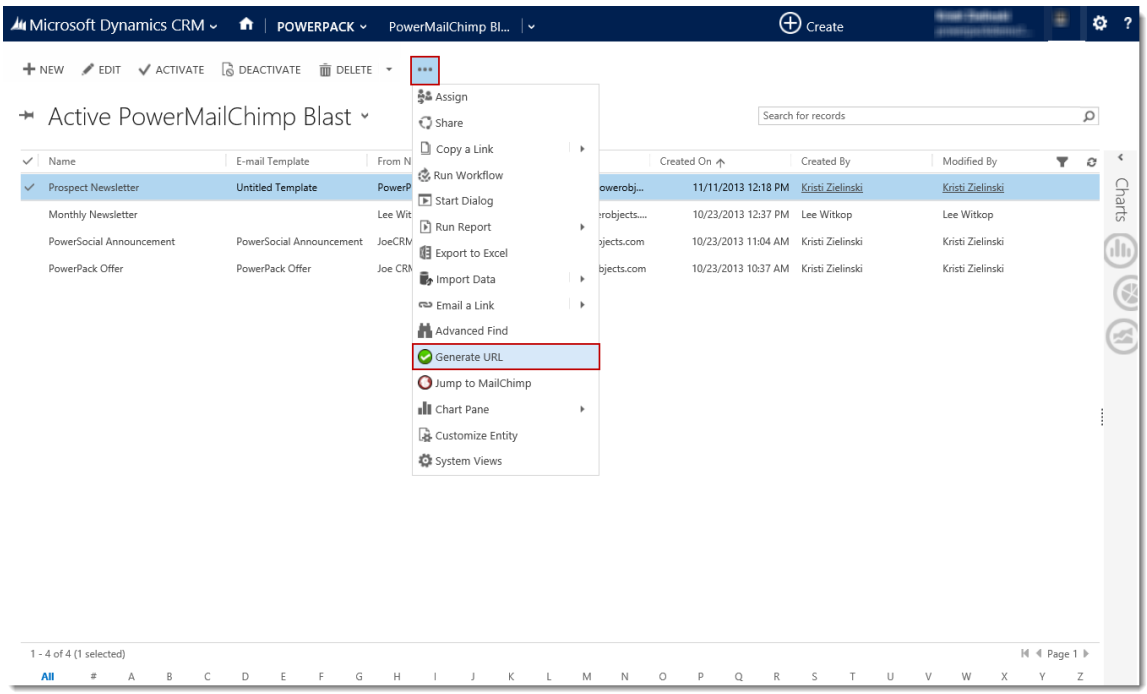
Editing Email Content

You can also choose to edit the MailChimp template directly from within Dynamics CRM. To do so, click on 'Edit E-mail' next to select MailChimp Template, doing so will open an .html editor where you can edit the email. When you are finished editing the template, click on OK. This will not change the template on the MailChimp side, changes are only reflected on the email being sent from that specific PowerMailChimp Blast.

Adding a PowerSurvey to a MailChimp Template

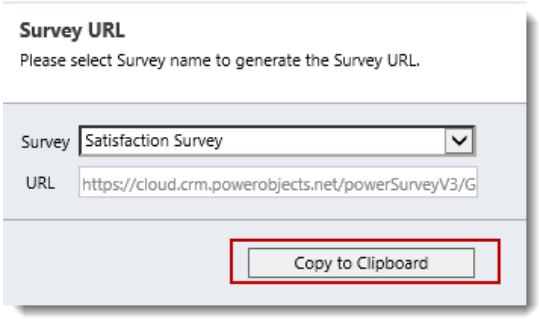
If you have PowerSurvey (one of PowerObjects' other PowerPack add-ons) installed, you will have the ability to send a survey within your bulk email and track the survey responses back to the email recipient's CRM record. To add a PowerSurvey to a bulk email it takes just a few extra steps, outlined below:

1. Create your survey in CRM as you normally would (refer to the PowerSurvey user guide for instructions on how to create a survey), once you're ready to insert the survey into the template, navigate to the PowerMailChimp section of your CRM and click on PowerMailChimp blast. Once there, you will see a button that says 'Generate URL' under the ellipsis

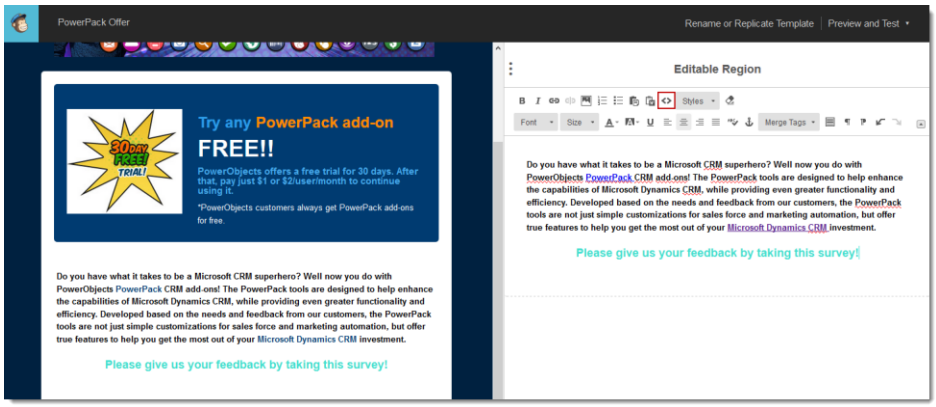


Note: *If this button is disabled, you do not have PowerSurvey installed and will need to install it in order to use this feature – download your free 30 day trial of PowerSurvey now!*

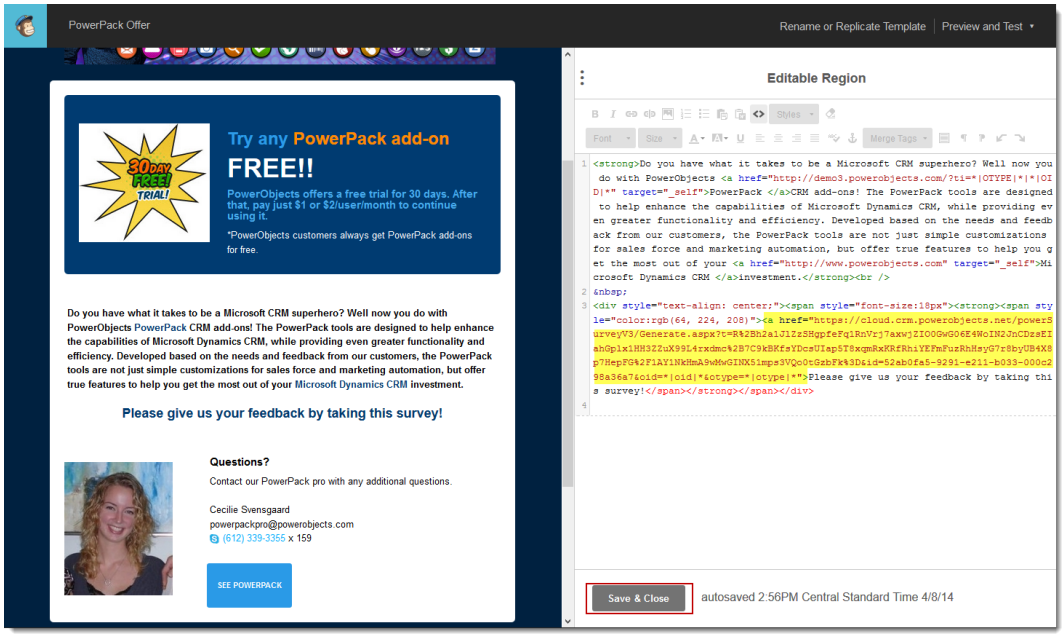
2. Once you click on the button, a window will pop open and allow you to select the survey you would like to put into your bulk email. Select your survey and select 'Copy to Clipboard'



3. Next log into your MailChimp account and bring up your bulk email template. Click in the section of the template where you'd like to add your survey and once the template editor has popped open, click on 'Source'



Navigate to where you want to put the survey link and paste

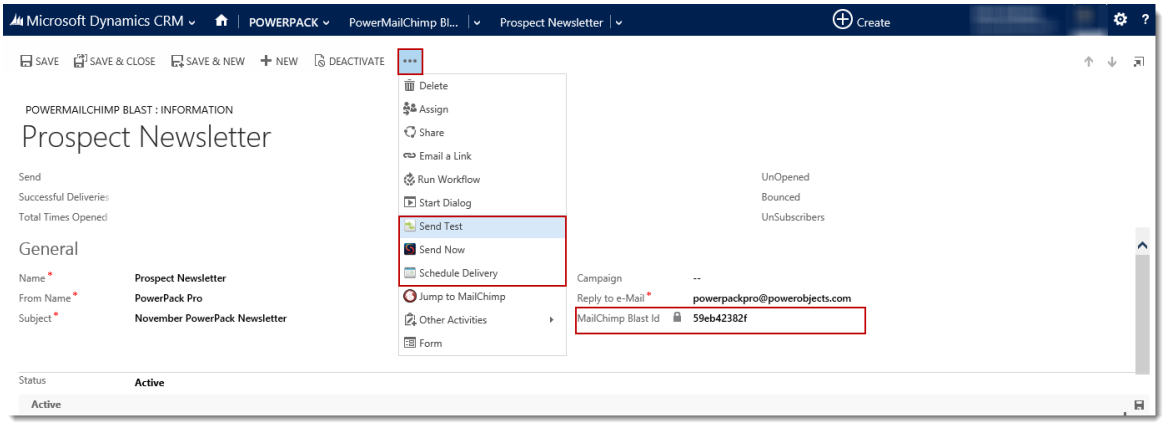


Now when you send out your PowerMailChimp blast, recipients have the option to click on that link and take a PowerSurvey. Their survey answers are then pulled back into CRM under their contact or lead record.

Sending the PowerMailChimp Blast

Once you have all the details specified for your PowerMailChimp Blast, be sure to click on Save in the upper right-hand corner to be certain you have captured all changes you made to the form. You will know that your blast has been successfully saved in MailChimp when you get a MailChimp blast ID populated back in CRM.

Once all the pieces of the PowerMailChimp Blast have been filled out and/or selected and you have saved the record, the MailChimp options under the ellipsis (...) will become available:

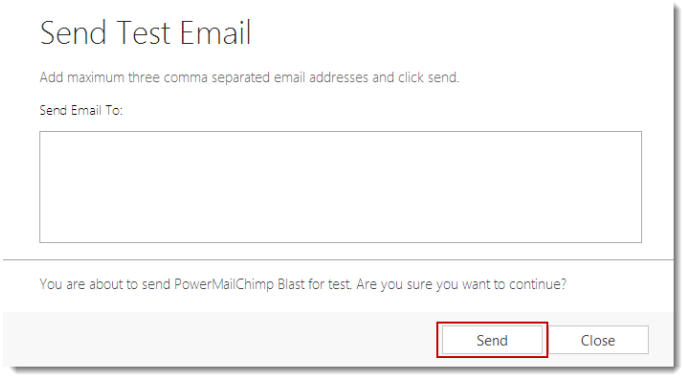


You have 3 options: Send Test E-mail, Send Now or Schedule Delivery.

Send Test

You can send a test email up to 3 recipients at a time. This is a great way to test the email and make sure everything looks ok when it shows up in an inbox. To send a test:

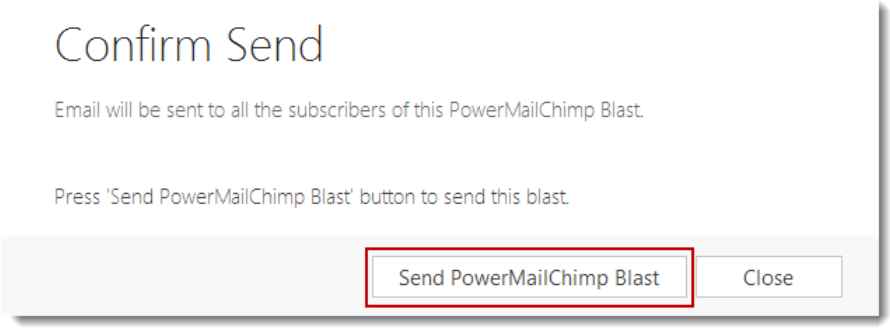
1. Select 'Send Test' from the ellipsis
2. Add up to 3 email addresses to send the test to, separated by semi-colons
3. Select Send
4. Once the test is sent, the dialog box will say "PowerMailChimp Blast test message sent successfully," once you get this message you can close the window



Note: *When you receive a test email in your inbox, any merge tags you have in your template will not actually be replaced with the correct value. They will still say "FNAME" (or whatever the merge tag was)*

Send Now

To send the PowerMailChimp blast immediately, click on Send Now from the ellipsis list, this will prompt a dialog box where you can confirm that you want to send your email blast.

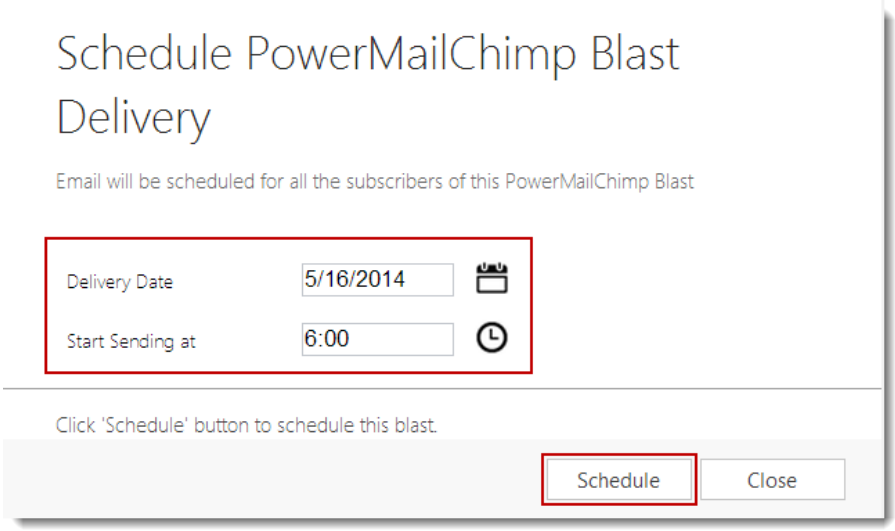


The message in the Confirm Send window will change to display that the sending process has started. You can close the window when you see this message.

Schedule Delivery

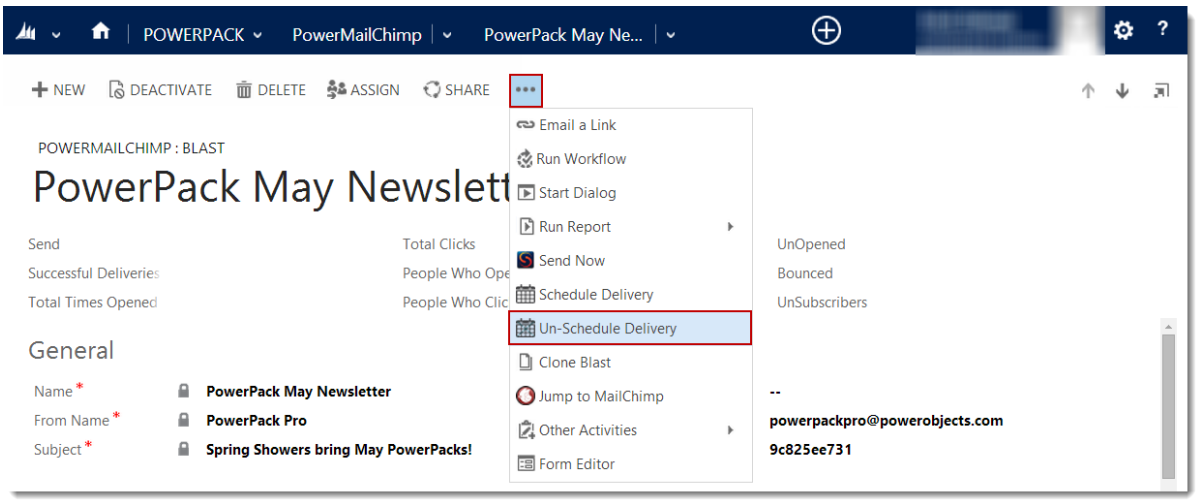
Your third option would be to schedule the delivery of the PowerMailChimp blast for a future date. To do this:

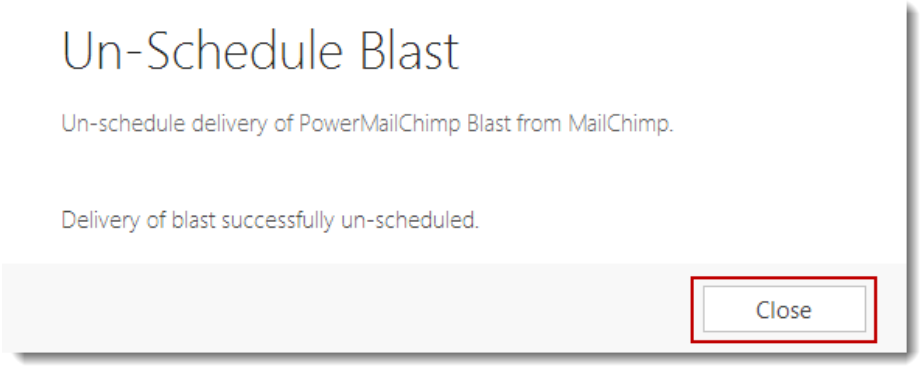
1. Click on the Schedule Delivery under the ellipsis list
2. Choose the day and time that you want to blast to be sent
3. Click on Schedule
4. You will see a message stating the delivery of your email has been scheduled. You can then close the window



Note: *The "To" field of the bulk email will automatically have the lead/contact's first name and last name in it.*

If you choose to schedule a delivery for your PowerMailChimp Blast, once you schedule, you will notice you will have the option to 'Un-Schedule Delivery' under the ellipsis of the PowerMailChimp Blast. If you choose to un-schedule, a dialog box will open confirming that the blast was un-scheduled.



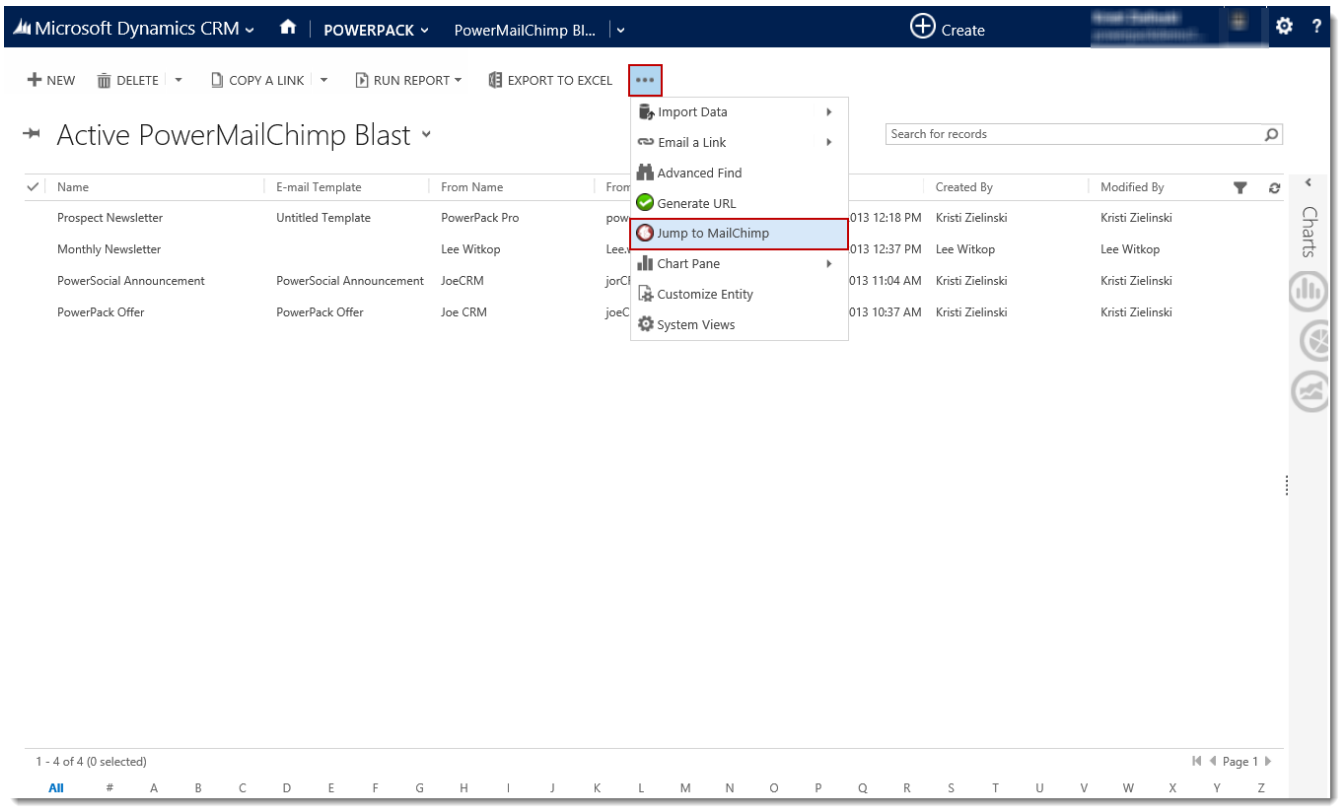


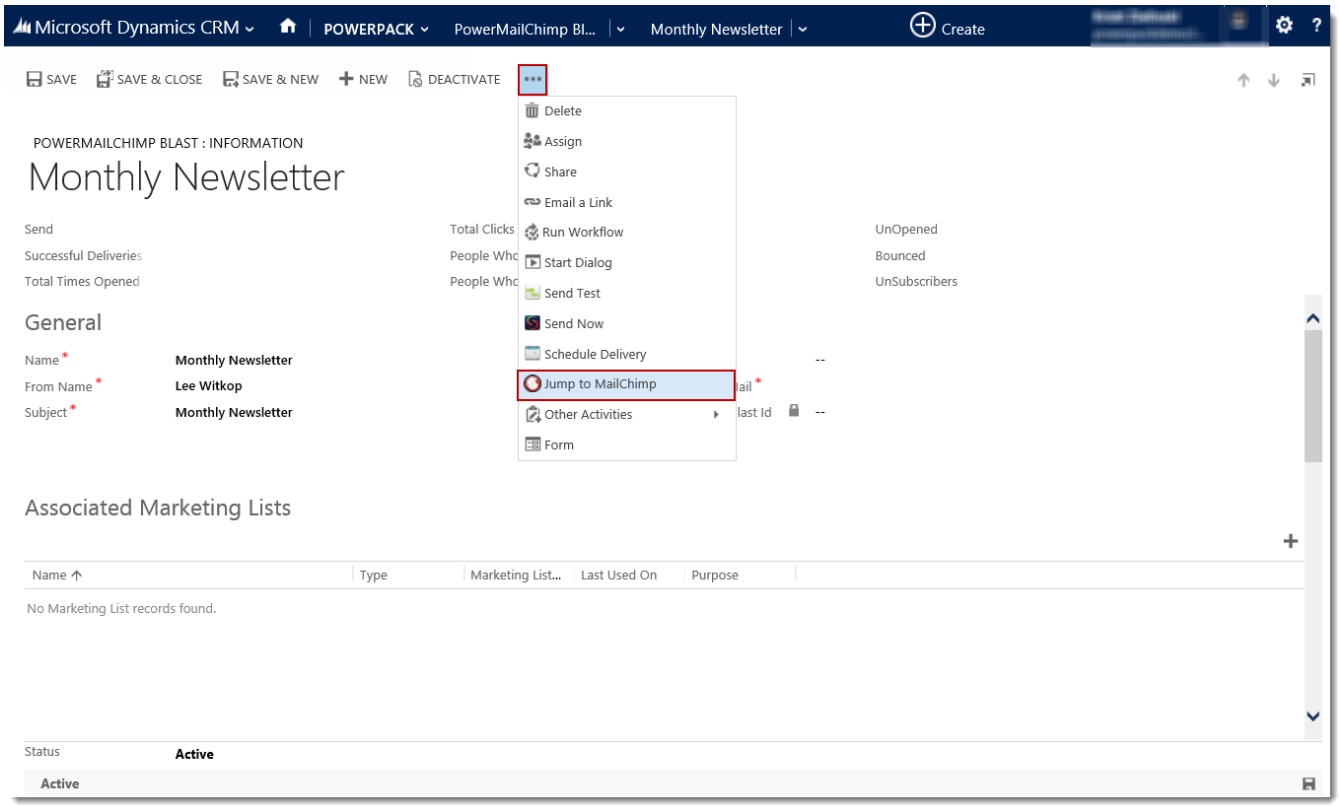
When a PowerMailChimp blast is sent the form becomes read-only. You cannot send the same PowerMailChimp Blast twice. You can, however, create a new PowerMailChimp blast mimicking the previously send blast and send that copy out. Please see the Copying a PowerMailChimp Blast section of the user guide.

If you created your blast in CRM, but accidentally sent it out from the MailChimp campaigns area, do not worry, as long as there is a MailChimp Blast ID associated to the PowerMailChimp Blast, your statistics will still be fed back to CRM.

Jump to MailChimp

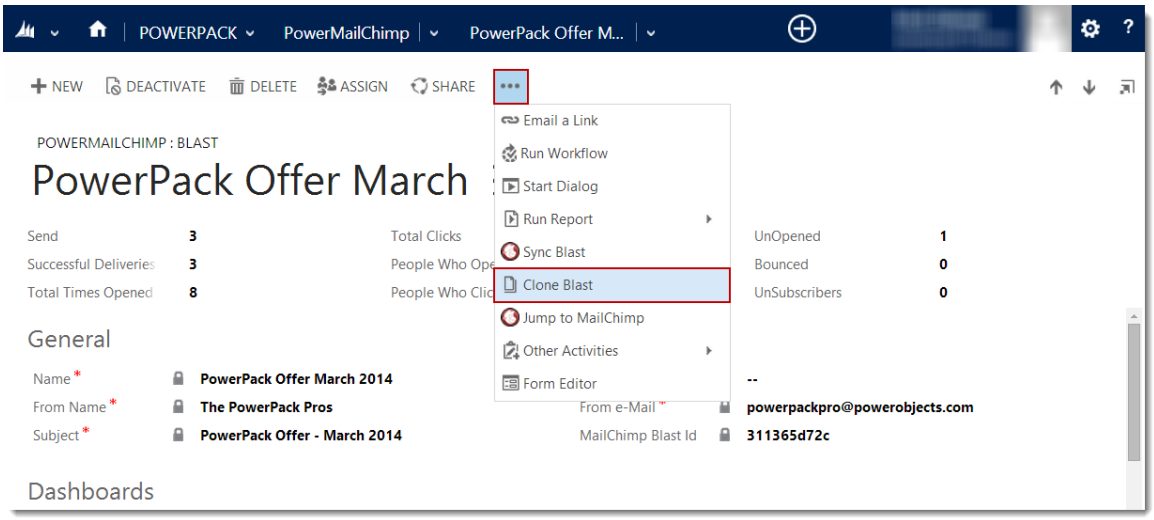
If at any time you need to navigate to your MailChimp account, simply click on the "Jump to MailChimp," button found in the ellipsis. This button can be found on the main PowerMailChimp blast view, as well as on each individual PowerMailChimp Blast record.

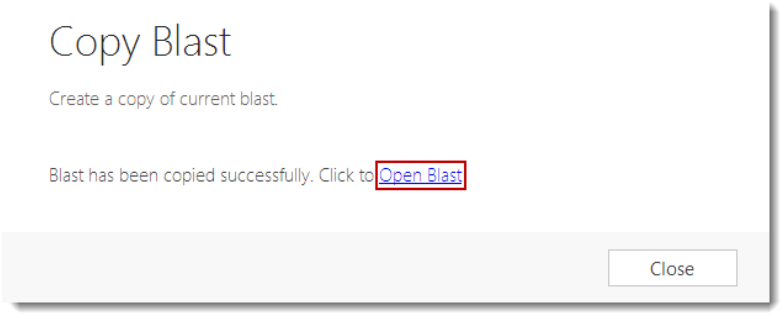

Microsoft Dynamics CRM
POWERPACK
PowerMailChimp BI...
Create
NEW
DELETE
COPY A LINK
RUN REPORT
EXPORT TO EXCEL
Active PowerMailChimp Blast
Search for records
Import Data
Email a Link
Advanced Find
Generate URL
Jump to MailChimp
Chart Pane
Customize Entity
System Views
Name
E-mail Template
From Name
Created By
Modified By
Prospect Newsletter
Untitled Template
PowerPack Pro
Monthly Newsletter
Lee Witkop
PowerSocial Announcement
PowerSocial Announcement
JoeCRM
PowerPack Offer
PowerPack Offer
Joe CRM
Charts
1 - 4 of 4 (0 selected)
Page 1


Microsoft Dynamics CRM
POWERPACK
PowerMailChimp BI...
Monthly Newsletter
Create
SAVE
SAVE & CLOSE
SAVE & NEW
NEW
DEACTIVATE
Delete
Assign
Share
Email a Link
Run Workflow
Start Dialog
Send Test
Send Now
Schedule Delivery
Jump to MailChimp
Other Activities
Form
POWERMAILCHIMP BLAST : INFORMATION
Monthly Newsletter
Send
Successful Deliveries
Total Times Opened
Total Clicks
UnOpened
Bounced
UnSubscribers
General
Name *
Monthly Newsletter
From Name *
Lee Witkop
Subject *
Monthly Newsletter
Associated Marketing Lists
Name
Type
Marketing List...
Last Used On
Purpose
No Marketing List records found.
Status
Active
Active

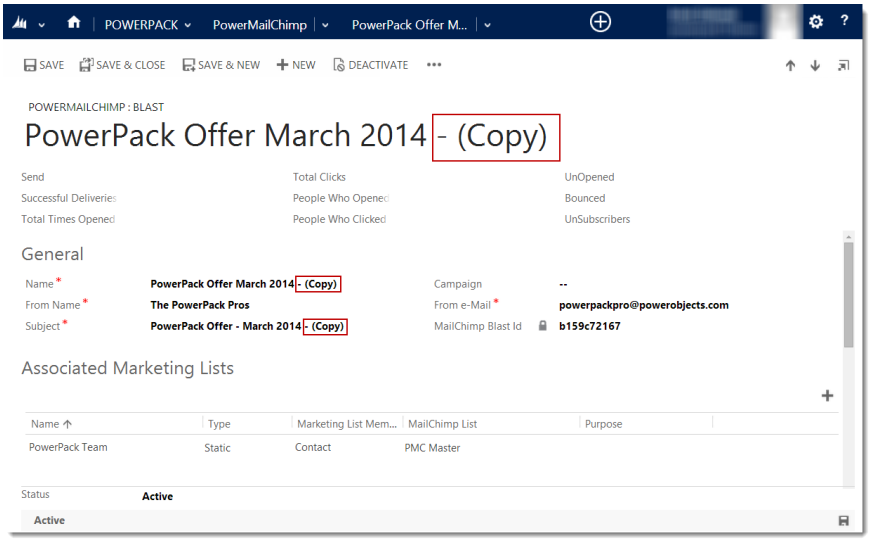
Copying a PowerMailChimp Blast

If you'd like to copy an existing PowerMailChimp Blast open the PowerMailChimp blast you would like to copy and select "Clone Blast," from the ellipsis dropdown.





When a copy of a blast is created, "-copy," will be added to the PowerMailChimp blast name, from name, and subject field. All parts of the blast, including the marketing list, template selected and PowerMailChimp Blast form fields will be copied.



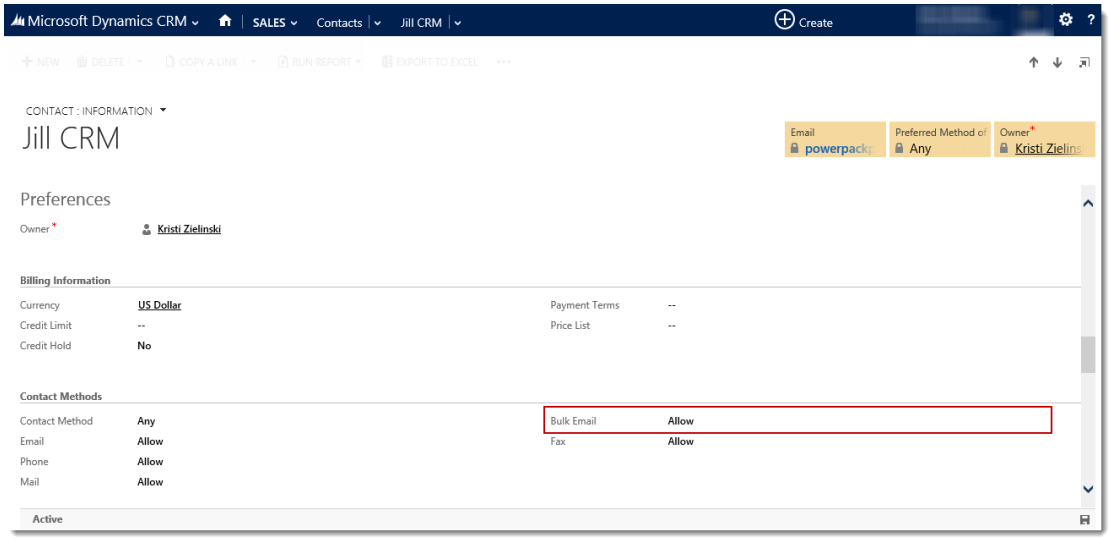
Unsubscribes from MailChimp / CRM

When someone unsubscribes from your PowerMailChimp blast, an unsubscribe activity type will be created and associated to that individual's CRM record. This person does not automatically get removed from your marketing list within CRM, but if you try to re-sync that person to MailChimp, you will not be able to.

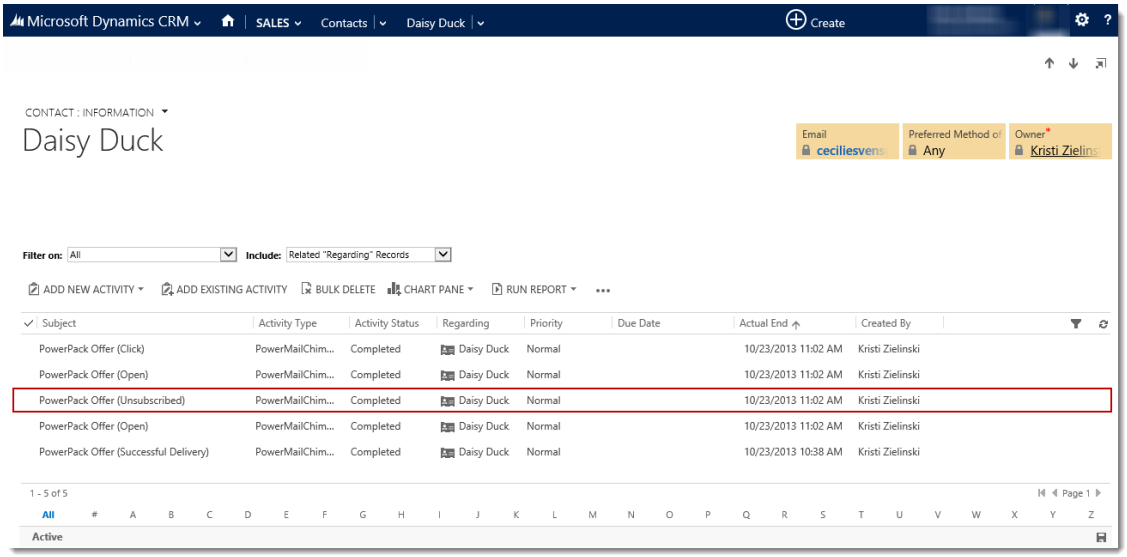
Within the unsubscribe activity, you will see the MailChimp list the person unsubscribed from and the reason unsubscribed (if given at time of unsubscribe).

The person who has unsubscribed from MailChimp will also get an email from MailChimp that they were successfully unsubscribed from the list.

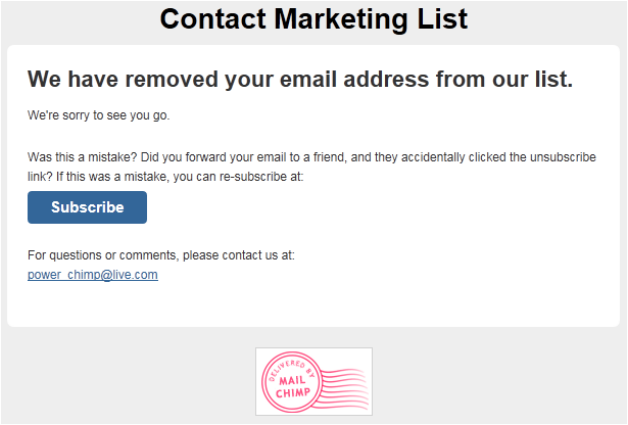
If a PowerMailChimp Blast is sent to a CRM account, contact, or lead the email blast must contain a link allowing subscribers to unsubscribe from the distribution list.



An unsubscribe activity type will also be created and associated to that person's CRM record.



The person who has unsubscribed from MailChimp will also get an email from MailChimp that they are unsubscribed from the list.



If a MailChimp Blast is sent to a CRM account, contact or lead, the blast contains a link "unsubscribe from this list".

Note: If you have more than one master list in MailChimp, and someone that is in both lists unsubscribes to only one of those master lists, the bulk email radio button will NOT be changed in CRM, but an unsubscribe PowerMailChimp activity will still be created and associated to the record, and that person will not receive any more bulk emails that are sent to THAT list.

Viewing Statistics

After a blast is sent, Dynamics CRM gathers tracking statistics from MailChimp and these stats are tracked against the PowerMailChimp Blast record as well as the records of the email recipients in CRM. Depending on the size of your bulk email campaign and the number of recipients you sent your bulk email to, statistics should show up in your CRM around half an hour after the message was sent out.

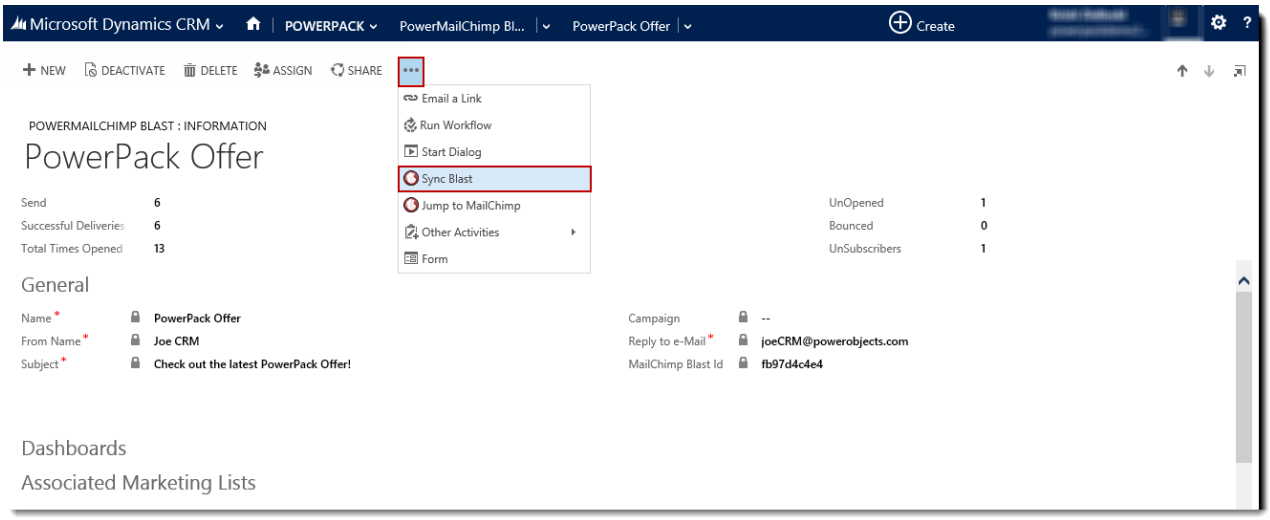
About PowerMailChimp Blast Statistics

Recipient's statistics are synchronized from MailChimp into Dynamics CRM. The data is pulled at regular intervals after the email blast is sent, with the length of the intervals decreasing after a period of time, as the responses and click throughs naturally taper off.

Dynamics CRM will first synchronize the statistics a half hour after an email blast is originally sent. After the initial data synchronization, the data will be pulled at the following intervals:

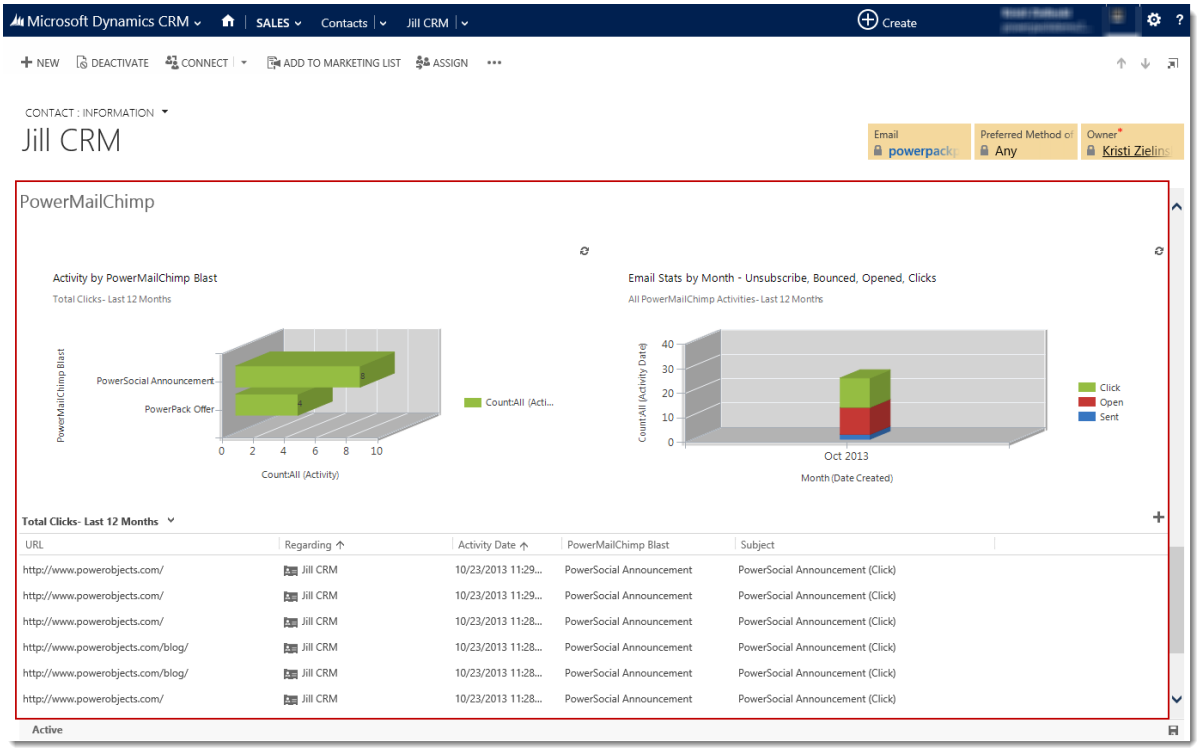
- For the first 72 hours after a PowerMailChimp Blast is sent, the data will be synchronized once per hour.
- From hours 72 – 144 after send, the data will be synchronized once per day.
- After 144 hours after send, the data will be synchronized once per week.

If you'd like your statistics to be updated more frequently, you can click the Sync Now Button, which can be found under the ellipsis dropdown (...) of the PowerMailChimp blast record.



On Contact or Lead Record

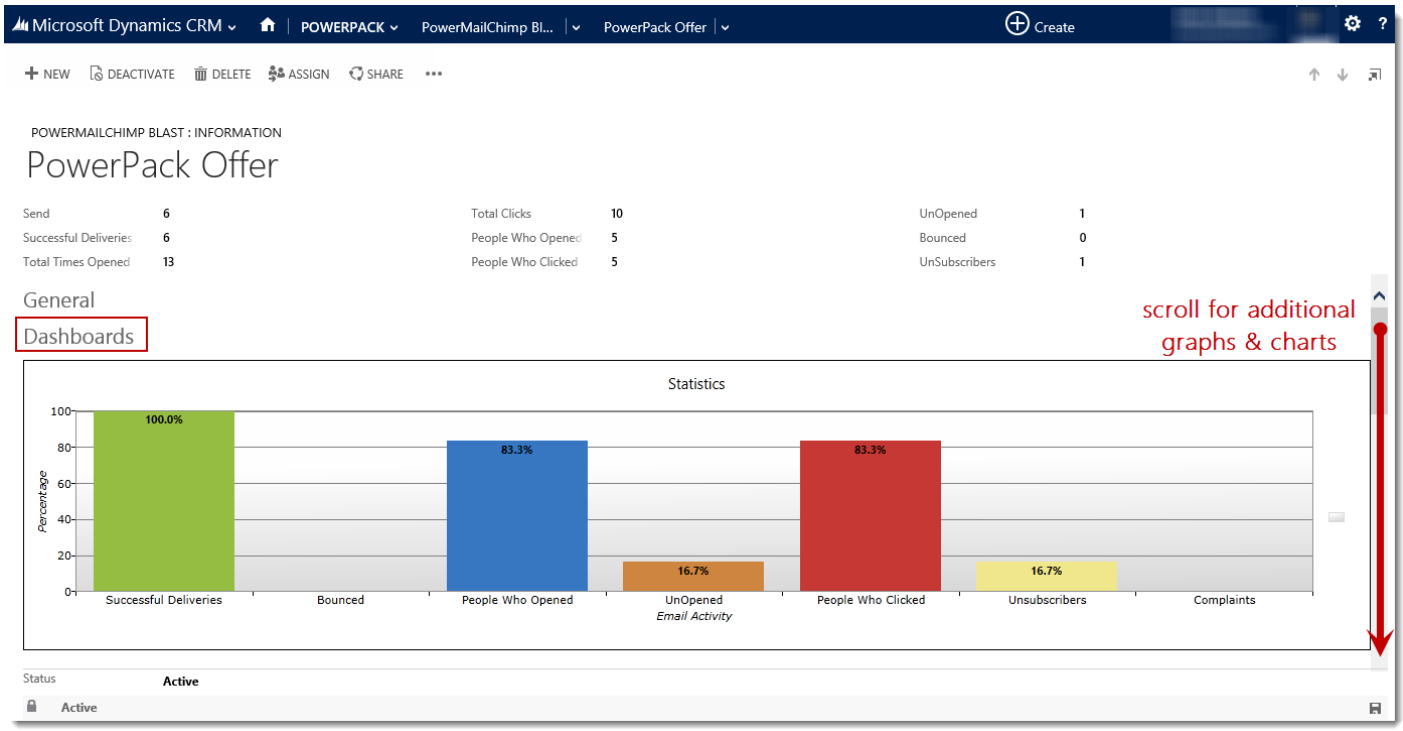
To see the statistics on the contact or lead record navigate to the specific record you would like to see and scroll to the 'PowerMailChimp' tab. This section will show you all of the bulk email actions that this particular person has taken.



Within each PowerMailChimp activity you will see the activity type (send, open, click, bounce, unsubscribe). Each activity will list which bulk email the activity is associated to, as well an activity date.

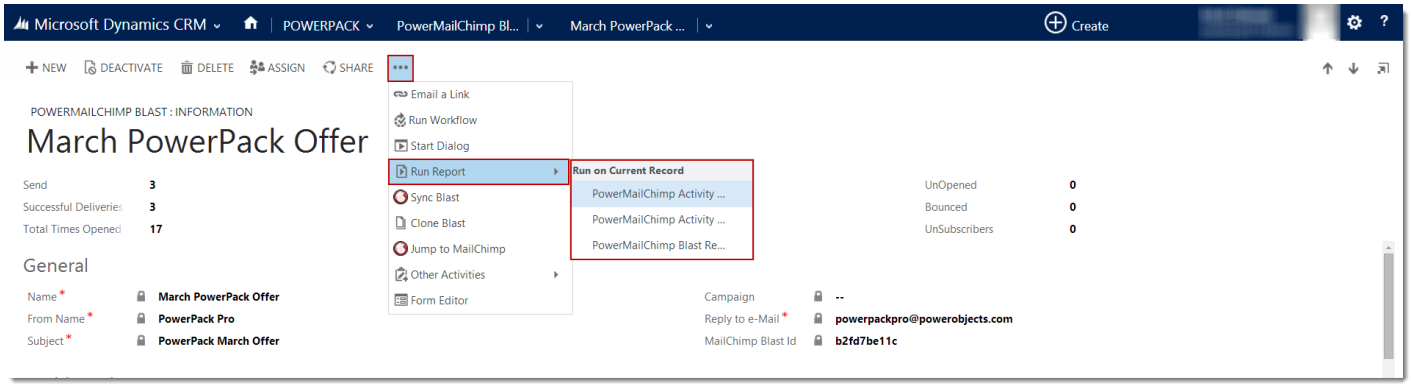
On PowerMailChimp Blast Record

The header will show some raw statistical data, and the Dashboards section on the record allows users to dig further into those statistics, as well as view individual's blast activities.

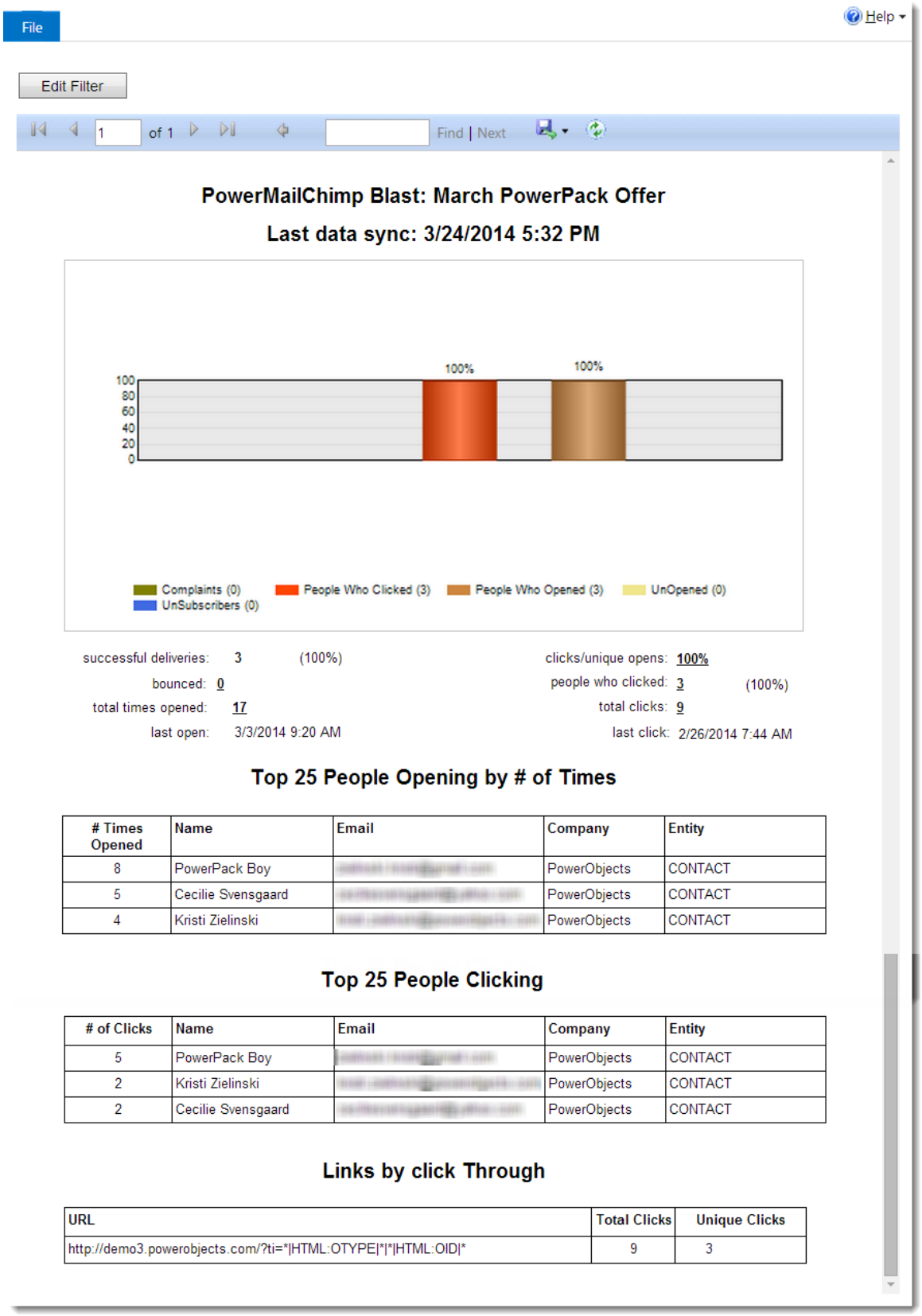


PowerMailChimp Blast Reports

PowerMailChimp comes with two pre-built reports that you can run after the statistics begin syncing. From the ellipsis on the PowerMailChimp Blast record users can select 'Run Report' and then select the PowerMailChimp Blast Report or the PowerMailChimp Activity Type Summary Report:



The PowerMailChimp Blast Report gives you the top level and “Top 25” statistics all in one place:



File

Help

Edit Filter

1 of 1 Find | Next

PowerMailChimp Blast: March PowerPack Offer

Last data sync: 3/24/2014 5:32 PM

successful deliveries:	3	(100%)	clicks/unique opens:	100%	
bounced:	0		people who clicked:	3	(100%)
total times opened:	17		total clicks:	9	
last open:	3/3/2014 9:20 AM		last click:	2/26/2014 7:44 AM	

Top 25 People Opening by # of Times

# Times Opened	Name	Email	Company	Entity
8	PowerPack Boy	[illegible]	PowerObjects	CONTACT
5	Cecilie Svensgaard	[illegible]	PowerObjects	CONTACT
4	Kristi Zielinski	[illegible]	PowerObjects	CONTACT

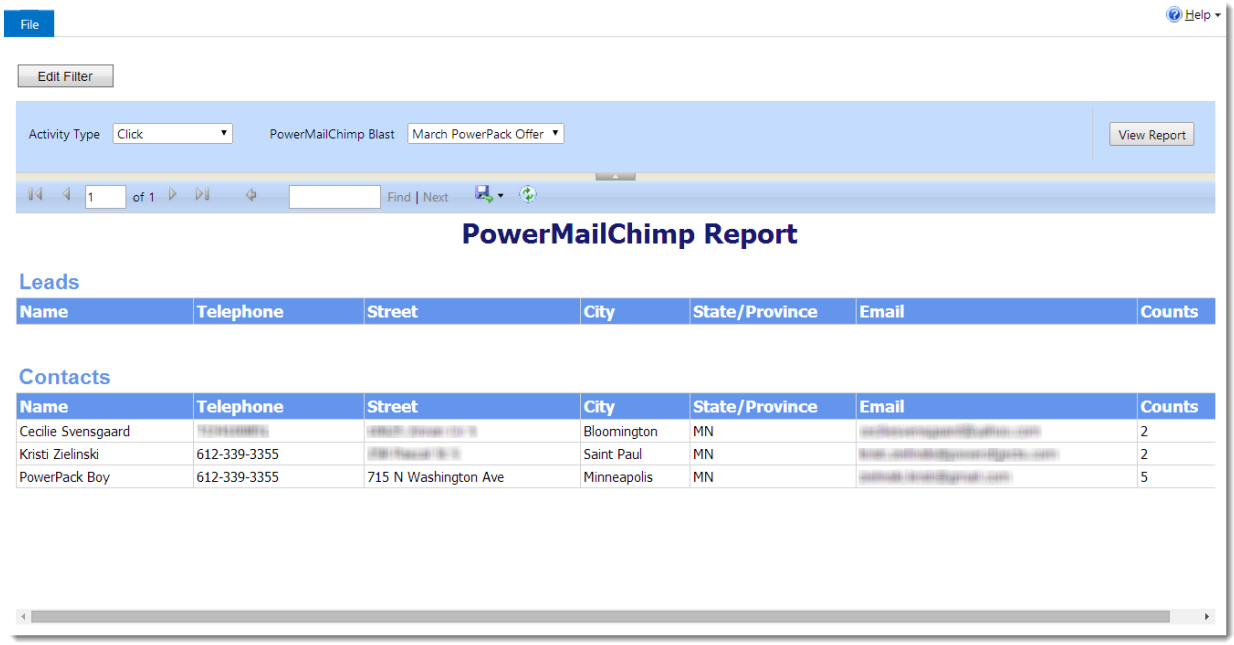
Top 25 People Clicking

# of Clicks	Name	Email	Company	Entity
5	PowerPack Boy	[illegible]	PowerObjects	CONTACT
2	Kristi Zielinski	[illegible]	PowerObjects	CONTACT
2	Cecilie Svensgaard	[illegible]	PowerObjects	CONTACT

Links by click Through

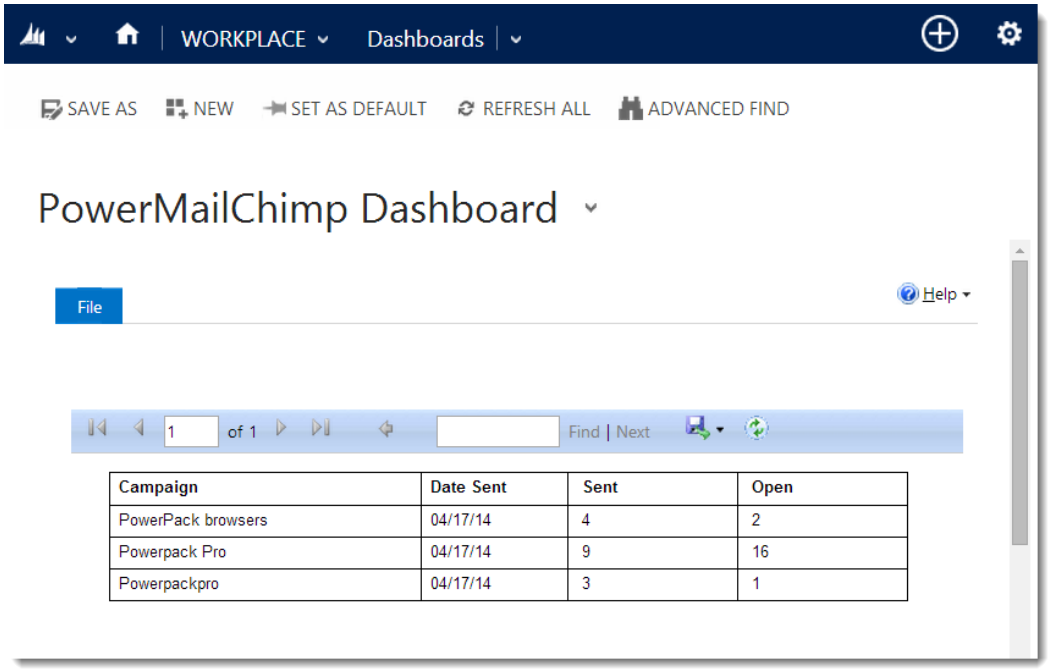
URL	Total Clicks	Unique Clicks
http://demo3.powerobjects.com/?ti=*|HTML:OTYPE|*|*|HTML:OID|*	9	3

The PowerMailChimp Activity Summary will allow you to select an activity type (send, open, click, etc.), choose a PowerMailChimp blast and list all leads, contacts or accounts that have that activity type. The report will list the person's name, phone number, street, city, state, email address and the number of time that activity occurred for that person.



PowerMailChimp Dashboard

The PowerMailChimp dashboard will appear in the list of dashboards that you have in your CRM system. This dashboard will list all of the PowerMailChimp blasts that you've sent out in the past month and the activities associated to those PowerMailChimp blasts, in summary form.



Deleting a PowerMailChimp Blast

If you would like to delete a blast in CRM for any reason, you may do so. However, please know that if you delete a PowerMailChimp Blast all activities (opens, clicks, unsubscribes, etc.) that were associated to that blast, will also be permanently deleted. If you delete a blast in CRM that blast will also be deleted from MailChimp. Deleting a PowerMailChimp blast in CRM or a campaign in MailChimp is not suggested.

Note: *You cannot delete a MailChimp campaign that has been sent in the past 7 days.*

Thanks for your interest in PowerMailChimp. Should you have any questions, contact us at 612-339-3355 or email powerpackpro@powerobjects.com. Remember, your trial will expire 30 days from the date of installation. If you are interested in subscribing, go back to the configuration screen and change "try" to "subscribe" and enter your credit card information – you will be charged $2/CRM user/month.

Interested in more CRM tips and tricks? Check out our blog or subscribe to our newsletter.