



e-shot

Guide for

Microsoft Dynamics

How to use the integrated e-shot™ features within Microsoft Dynamics

Version 1

March 2018

Contents

1. Introduction	3
2. Contact synchronisation	4
3. Audit page.....	6
4. Campaigns page	7

1. Introduction

The integration of Microsoft Dynamics with e-shot™ offers two main benefits:

- Contacts can be exported from Microsoft Dynamics into an e-shot™ contact group of your choice
- e-shot™ campaign statistics and interaction details can be viewed within Microsoft Dynamics

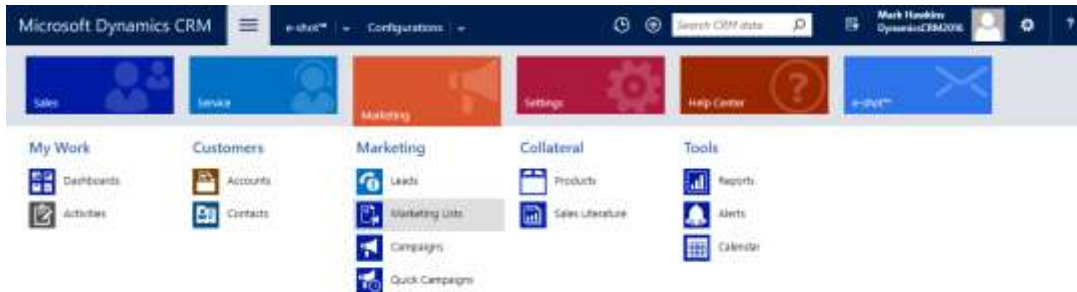
Leads and Contacts can be pushed from Microsoft Dynamics into e-shot™ via the Marketing List page in Microsoft Dynamics to a chosen e-shot™ group. Once imported into e-shot™, the contacts can be used in any campaign.

Microsoft Dynamics will retrieve campaign performance information from e-shot™, allowing you to view clicks, displays, sends, hard bounces, unsubscribes and interaction details.

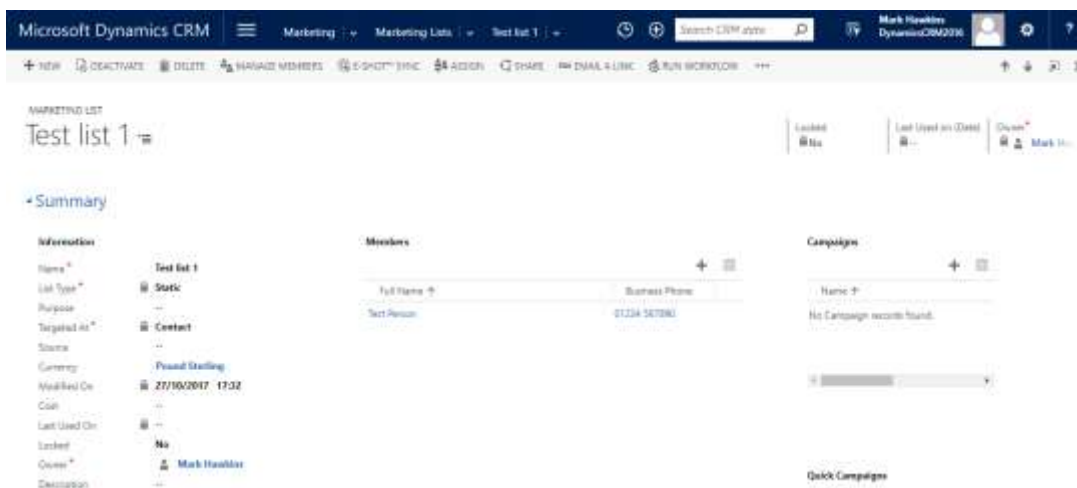
This document will walk you through the synchronisation process and help to illustrate how the two systems interact.

2. Contact synchronisation

Once the installation and setup processes have been completed you are ready to synchronise Microsoft Dynamics contacts with e-shot™. The starting point for the synchronisation is the Marketing List page, which is accessible from the main menu, by clicking Marketing and then Marketing Lists.



In order to start a synchronisation or view the progress of existing synchronisations you will need to log in as a Microsoft Dynamics user assigned the 'e-shot - Sync' Security Role. Please refer to our 'Microsoft Dynamics Installation & Setup Guide' for further information on the required Security Roles.



From here you can select either a list of Contacts or Leads you would like to synchronise and click on the E-SHOT™ SYNC ribbon button to open the Contacts Push page. Either a Static or Dynamic list type can be chosen, although e-shot™ currently treats both types as if they are Static.

The e-shot™ subaccount to synchronise with will automatically be selected, so you just need to select a group within that subaccount and click Sync. Typing into the group selection field will autocomplete the group name based on the entered text, which helps to locate your group quickly without having to scroll through a long list.

If you would like to create a new group, select the '< Create new group >' option and enter your desired group name in the box provided.

The screenshot shows a web interface titled "Contacts Push (e-shot™)". It contains three main sections for synchronization:

- Sync from marketing list:** Includes three input fields: "Marketing List Type" (with "Contact" selected), "Marketing List Name" (with "Test list" selected), and "Marketing Member Count" (with "1" selected).
- Sync from subaccount:** Includes a "Name:" field with "Abbeychart" entered.
- Sync to subaccount group:** Includes a "Search group name:" dropdown menu currently showing "Select a group".

Below the "Search group name:" field is a yellow callout box with the following text: **Please note** if any duplicate email addresses are identified in the contacts list to sync, only the last duplicate entry passed in the list will be applied.

At the bottom right of the form is a green button labeled "Sync."

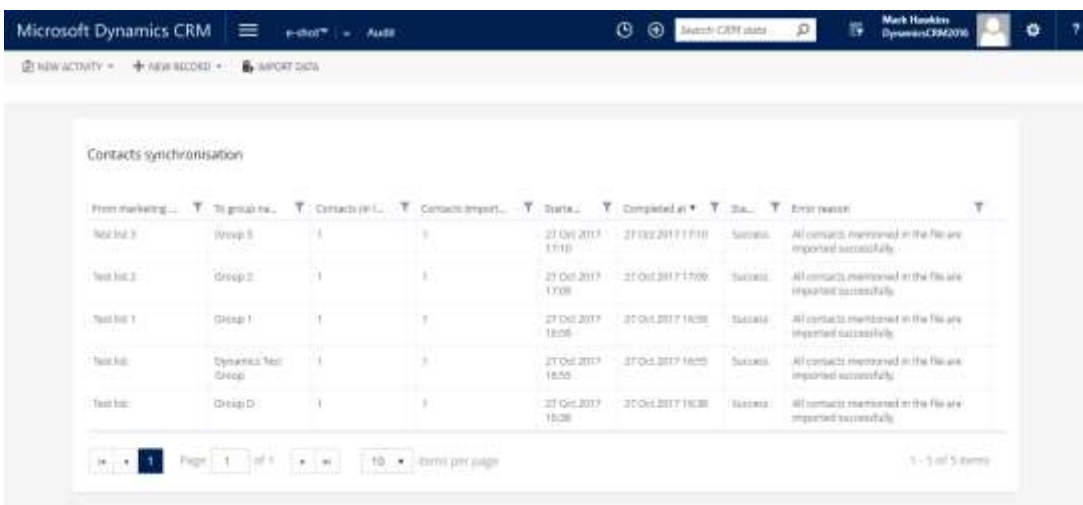
After clicking Sync, a message will be displayed to indicate that the contacts have been queued for an import into e-shot™ and a link to the Audit page will display at the bottom of the screen.

3. Audit page

Once a synchronisation has been triggered, the progress can be monitored from the Audit page, which is viewable by users with the 'e-shot - Sync' Security Role. To navigate to the Audit page, select e-shot™ from the main menu and then Audit, or click the link from the Contacts Push page after a synchronisation.



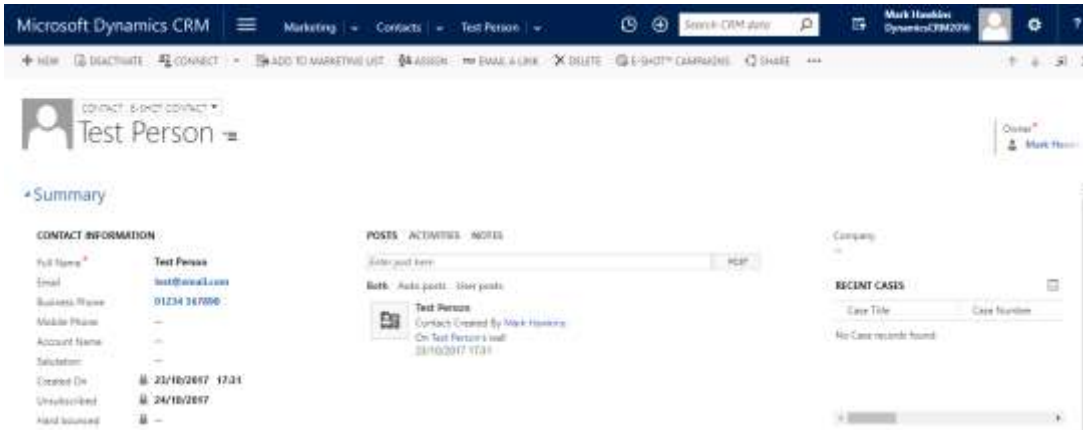
The Audit page will display all of the synchronisations and their status, displaying 10 per page. If any of the synchronisations fail then a link will be present to download the report.



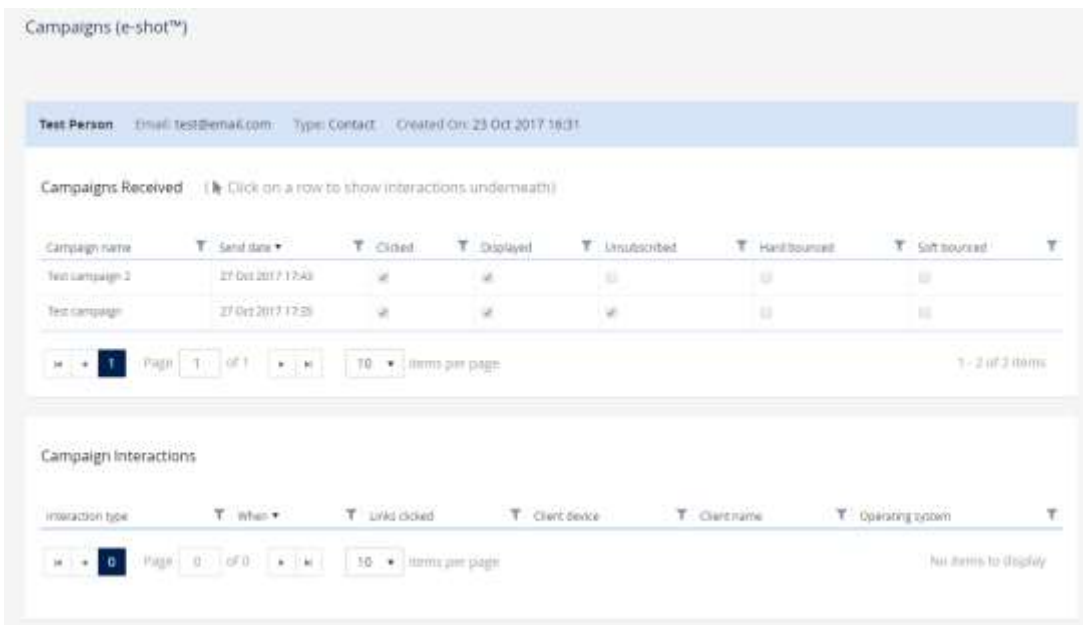
All of the columns can be sorted and filtered to enable you to locate a chosen synchronisation more easily.

4. Campaigns page

The e-shot™ campaign statistics are pulled through to Microsoft Dynamics and can be accessed by clicking the E-SHOT™ CAMPAIGNS ribbon button on the Contacts or Leads pages.



Clicking on the E-SHOT™ CAMPAIGNS ribbon button will navigate the user to the Campaigns page. This will present the user with a list of all the e-shot™ campaigns the contact or lead has been sent, as well as their interaction history for a selected e-shot™ campaign.



If you click on one of the rows within the Campaigns Received table the Campaign Interactions table will be populated for the specified campaign.

Campaigns (e-shot™)

Test Person - Email: test@email.com - Type: Contact - Created On: 23 Oct 2017 16:31

Campaigns Received (Click on a row to show interactions underneath)

Campaign name	Send date	Clicked	Displayed	Unsubscribed	Hard bounced	Soft bounced
Test campaign 2	27 Oct 2017 17:43	0	0	0	0	0
Test campaign	27 Oct 2017 17:35	0	0	0	0	0

Page 1 of 1 | 10 items per page | 1 - 2 of 2 items

Campaign Interactions

Interaction type	When	Links clicked	Client device	Client name	Operating system
Clicked	27 Oct 2017 17:44	http://www.somethg.com			
Displayed	27 Oct 2017 17:44		Desktop	Outlook 2013	Windows 10
Displayed	27 Oct 2017 17:42		Desktop	Outlook 2013	Windows 10

Page 1 of 1 | 10 items per page | 1 - 3 of 3 items