



MailChimp Connector

user's manual



Manual Version 1.0

Copyright 2004-2012 crm-now GmbH

CRM MailChimp Connector - Manual

Copyright © 2004-2012 crm-now GmbH, all rights reserved.

1. Edition

Trade Marks

Many of the designations used by manufacturers and sellers to distinguish their products are claimed as trademarks. Where those designations appear in this manual, and crm-now was aware of a trademark claim, the designations have been printed.

Disclaimer

While every precaution has been taken in the preparation of this book, the publisher assumes no responsibility for errors or omissions, or for damages resulting from the use of the information contained herein.

The original developer of the MailChimp extension module for the vtiger CRM is Target Integration Ltd, see <http://www.targetintegration.com>.

Manual ID: 512_029_001

Table Of Content

1.	Purpose	4
2.	Create a CRM - MailChimp™ Connection	4
2.1.	Get a MailChimp™ account	4
2.2.	Generate MailChimp™ access data	4
2.3.	Assign the MailChimp™ key	5
2.4.	Create List in MailChimp™	5
3.	Use of the MailChimp™ Connector	5
3.1.	Create Group at the CRM	5
3.2.	Synchronize a CRM Group Entry with MailChimp™	7
4.	Support	8

1. Purpose

The CRM MailChimp™ extension connects MailChimp™ with the CRM and provides CRM data for serial mails with MailChimp™.

The following features are provided:

- ✓ Fast installation as CRM extension
- ✓ Use of CRM's custom lists or single contact entries
- ✓ Consideration of privilege settings
- ✓ Full support of all MailChimp™ features

2. Create a CRM - MailChimp™ Connection

In order to have a working CRM - MailChimp™ connection, the following 3 steps are required:

1. Get a MailChimp™ account
2. Generate MailChimp™ access data for the CRM
3. Create a MailChimp™ list

2.1. Get a MailChimp™ account

To get a MailChimp™ open the following URL:

<http://mailchimp.com>

Click „Sign Up Free“ and follow the instructions. Make sure you enter a valid email address.

2.2. Generate MailChimp™ access data

Login at MailChimp™ and enter the menu **[Accounts]** -> **[API Keys]**. Click **[Add A Key]**. This will generate an access key for you which can be used at the CRM, as shown in the following figure.

Your API Keys

Created	Label	API Key	QR Code	Status
Oct 13, 2012 05:01 am	none set	7c003fcffa3663351a3368cd8e47-us6	QR	Disable

Add A Key

API keys provide full access to your MailChimp account, so keep them private. [tips on keeping API keys safe](#)

This is the key for the CRM.



Document type:
Author:

Manual
crm-now GmbH

Date:
Version#:

08.11.2012
1.0

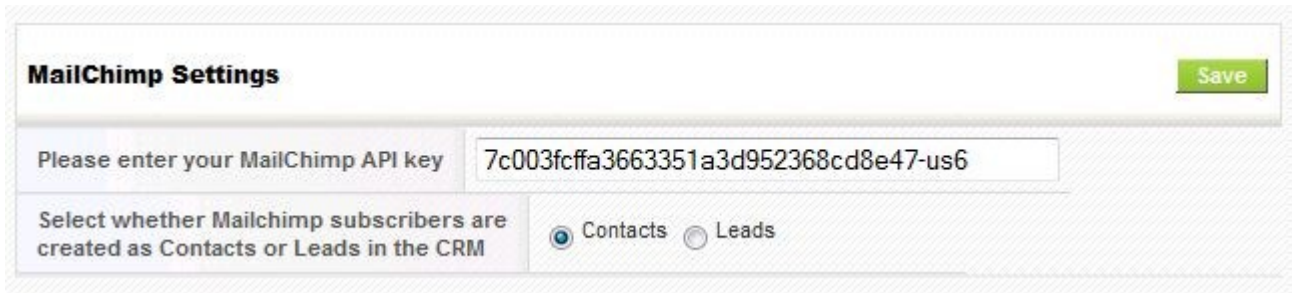
Page:

4

Copy the API Key.

2.3. Assign the MailChimp™ key

As CRM administrator goto the menu [\[Settings\]](#) -> [\[Mailchimp\]](#), as shown in the following figure:



Enter your API key. In addition to the key, you need to decide whether new entries in MailChimp™ are going to create new Contacts or Leads in the CRM.

Click [\[Save\]](#). The CRM checks the MailChimp™ connectivity automatically and displays the result.

2.4. Create List in MailChimp™

MailChimp™ uses so called Lists for organizing the mailings. Within a List you may see all recipients. The CRM need at least one List in MailChimp™ for its operation.

To create a List go to the [\[Lists\]](#) menu and click [\[Create List\]](#). Follow the instructions. You may create as many lists you need. These lists will be also available at the CRM.

3. Use of the MailChimp™ Connector

3.1. Create Group at the CRM

Go to the CRM menu [\[Marketing\]](#)->[\[Mailchimp\]](#) and create a new entry. This is called a MailChimp group entry and is identical with a group entry at the MailChimp™ system. The following figure is an example.

Creating New MailChimp Group

Basic Information

Save Cancel

Mailchimp Information

*Group Name	Boston prospects	Group Id	AUTO GEN ON SAVE
Group Type	Marketing	Group Status	Active
*Assigned To	<input checked="" type="radio"/> User <input type="radio"/> Group Geist Christel		

Description Information

Description: for demo only

Save Cancel

The following user scenario explains how to use the grouping:

Let's assume we have created at MailChimp™ a list with the name 'Tradeshow New York 08/13'. We would like to invite prospects from New York, Boston and Washington DC with a serial email. We also assume that we will use these prospect lists also for further mailings in the future.

We want to make the mailing list compilation only once and do the following:

1. Create a CRM group entry with the name 'Boston prospects' and add all prospects from the Boston area to this group.
2. MailChimp™ synchronization of this group for the list 'Tradeshow New York 08/13'
3. Create a CRM group entry with the name 'New York prospects' and add all prospects from the New York area to this group.
4. MailChimp™ synchronization of this group for the list 'Tradeshow New York 08/13'
5. Create a CRM group entry with the name 'Washington DC prospects' and add all prospects from the Washington DC area to this group.
6. MailChimp™ synchronization of this group for the list 'Tradeshow New York 08/13'

This will add all prospects to the MailChimp™ list 'Tradeshow New York 08/13', to be accessed by the menu [\[Lists\]](#) -> ['Tradeshow New York 08/13'](#) -> [\[Subscribers\]](#). In addition, you may find the groups in the menu [\[Lists\]](#) -> [\[Groups\]](#).

The list of subscribers is an assembly of the content in the related groups:

Tradeshow New York 08/13 =
 Boston prospects +
 New Yourk prospects +
 Washington DC prospects

You may create a new list in MailChimp™ and add the same groups if desired.

3.2. Synchronize a CRM Group Entry with MailChimp™

Once you have created in the CRM a Mailchimp™ group you may use the related entry menu at a group's detail view to add subscribers. You may add single subscribers or subscribers from a customized list view as illustrated in the next figure:

Contacts								
Showing Records 1 - 1 of 1								
<div> <div>1 of 1</div> <div>-- Please select list --</div> <div>load list</div> <div>Select Contacts</div> <div>Add Contact</div> </div>								
Last Name	First Name	Beziehung	Account Name	Email	Office Phone	Vermittler	Assigned To	Action
Nieve	Nadim		Music Prod		071-96666		ar	edit del

After you have added all related entries you may click [[Synchronisation with MailChimp](#)] located at the right upper side of the detail view. This will open a new popup dialog as shown in the next figure:

Synchronisation with MailChimp

Lists

--NONE--

Group Name

New Group Name

Cancel

Synchronisation

List name in MailChimp

Group Name in MailChimp

new Group Name

You may select the Mailchimp™ list and group you want to use for synchronization. If no group exists the CRM will assign a group name automatically.

When done you may start your mailing at the Mailchimp™ system.

4. Support

This extension is provided as is and no warranties are given. Please post your questions at vtiger's forum at <https://forums.vtiger.com>

crm-now improves this MailChimp extension from time to time. Before you post any issues make sure you have the actual version installed.



Document type:
Author:

Manual
crm-now GmbH

Date:
Version#:

08.11.2012
1.0

Page:

8