



MailChimp Connector

user's manual

Manual Version 2.0

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CRM MailChimp Connector - Manual

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3rd Edition

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1. Purpose

The CRM MailChimp™ extension connects MailChimp™ with the vtiger 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-us€	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.

Copy the API Key.

2.3. Assign the MailChimp™ key

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

MailChimp Settings	
Please enter your MailChimp API key	<input type="text" value="73453fcffa3645345a3d9523634d8e47-us6"/>
Select whether Mailchimp subscribers are created as Contacts or Leads in the CRM	<input checked="" type="radio"/> Contacts <input type="radio"/> Leads

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 an 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				Save	Cancel
Mailchimp Information					
* Group Name	<input type="text" value="Spring Mailing"/>	Group Type	<input type="text" value="Marketing"/>		
Group Status	<input type="text" value="Planning"/>	* Assigned To	<input type="text" value="Marketing Group"/>		
Description Information					
Description	<input type="text" value="this is our regular spring mailing group"/>				

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 08/16'. 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 08/16'
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 08/16'
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 08/16'

This will add all prospects to the Mailchimp™ list 'Tradeshow New York 08/16', to be accessed by the menu [Lists] -> 'Tradeshow New York 08/16' ->[Subscribers]. In addition, you may find the groups in the menu [Lists] -> [Groups].

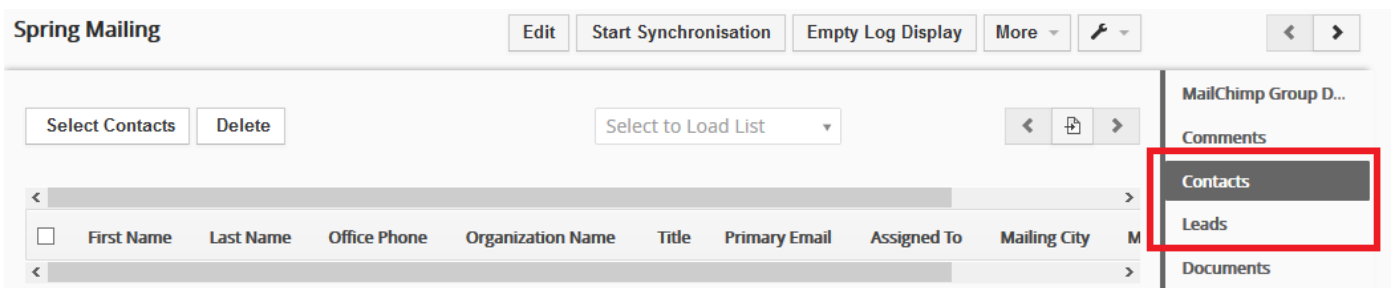
The list of subscribers is an assembly of the content in the related groups:

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 (Contacts or Leads). You may add single subscribers or subscribers from a customized list view as illustrated in the next figure:



When you have added all related entries, you can click [Start Synchronisation] after you switched back to the Mailchimp Group Detail view. This will open a new popup dialog as shown in the next figure:

MailChimp lists X

MailChimp lists --None--

Group Name

New Group Name

Synchronisation Cancel

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.

3.3. Salutation Handling with MailChimp™

For Leads or Contacts you have a salutation field at the CRM. Whenever you make your first (!) transfer of CRM data to a MailChimp™ list, the CRM will create a new field, called “Salutation” at MailChimp™ and will fill this by all subsequent transfers.

4. Support

This extension is provided free of charge as is without any warranty. You can use or entry at vtiger's discussion page for asking questions, reports bugs or any other related topic.

Further support can be given but we charge our regular fees for this service.

In case of such a service request you may contact crm-now 24/7 by email, phone or fax.

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All inquiries will be answered. If you do not get an answer within one business day, crm-now did not receive your message. In this case please contact crm-now again.



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