

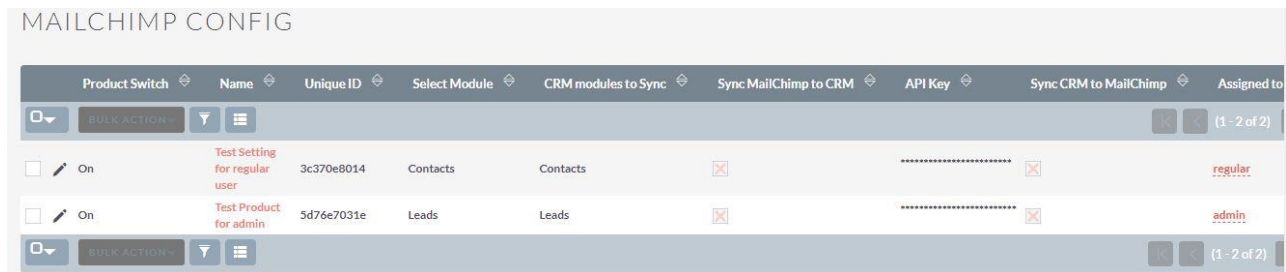


SuiteCRM Mailchimp Integration (Premium)

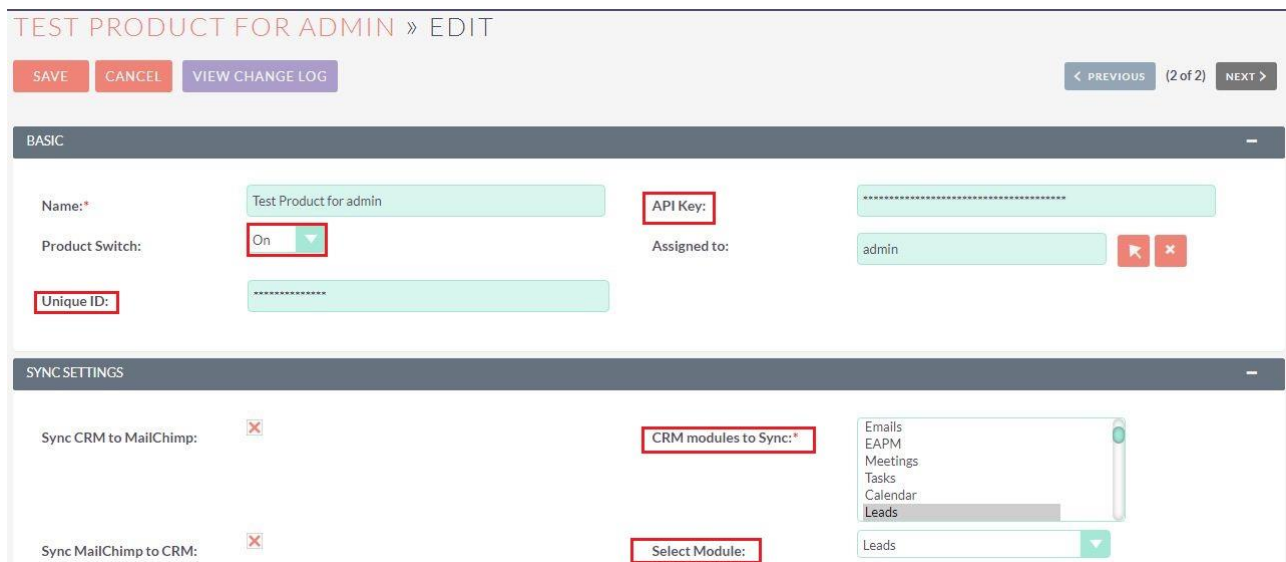
User Guide

User Guide:-

1. Go to the admin panel and click on “Mailchimp config” option.



2. Give a name to settings, enter Mailchimp API key, Unique id, and fill other details.



3. Open Mailchimp and go to profile>extra>api keys>create a key. When the key is generated, Paste it into SuiteCRM

Your API keys

API keys provide full access to your Mailchimp account, so keep them safe. [Tips on keeping API keys secure.](#)

Created	User	Label	API key	QR Code	Status
May 04, 2021 1:36 am	jeff bezos95 (owner)	none set	*****	QR	<input checked="" type="checkbox"/>

Copy API Key from Mailchimp

Create A Key

4. After saving the api key you can see webhook url/callback url at the top of dashboard. Copy this url.


TEST PRODUCT FOR ADMIN

Mailchimp CONNECTION ACTIONS

Copy webhook url from here

Mailchimp Conenction:

WEBHOOK URL: https://outrightdev.link/mohit/friday_05_21_527/index.php?entryPoint=outr_mailchimp_webhook_entrypoint



jeff bezos95
Email: sharma.mohit@outrightcrm.com
Account Type: Outright Store
Username: jeffbezos95
Company: Outright Store
5560 Progress Rd,United States,Indianapolis,IN,46241-4324,US

Total Lists:	1
Total Members:	3
Total Campaigns:	9
Last Subscriber:	2021-05-24
Total Unsubscribers:	0

Sync Mailchimp to CRM Sync CRM to Mailchimp Get campaigns from Mailchimp

BASIC

Name: Test Product for admin API Key: *****

Product Switch: On Assigned to: admin

- 5. Open Mailchimp and go to Audience>manage audience>settings>webhook. In this page paste the url in Callback url field.



- 6. Copy the unique id from Mailchimp and paste it into SuiteCRM Mailchimp Configuration setting.

Required email footer content

Enter contact info about this audience and a permission reminder in case someone reports you for spamming.

Email beamer

Send a campaign by sending an email to a private Mailchimp address.

Google Analytics on archive pages

Add Google Analytics tracking to campaign archives.

Webhooks

Keep your audience synced with a local list on your server.



7. We have created two Separate settings for two different Mailchimp accounts. Both are assigned to different modules and users.

MAILCHIMP CONFIG

Two separate settings for two different Mailchimp accounts

Product Switch	Name	Unique ID	Select Module	CRM modules to Sync	Sync MailChimp to CRM	API Key	Sync CRM to MailChimp	Assigned to
<input type="checkbox"/>	On	Test Setting for regular user	3c370e8014	Contacts	Contacts	<input checked="" type="checkbox"/>	regular
<input type="checkbox"/>	On	Test Product for admin	5d76e7031e	Leads	Leads	<input checked="" type="checkbox"/>	admin

8. Here are the two Mailchimp accounts that we are going to use.

Two separate Mailchimp Accounts

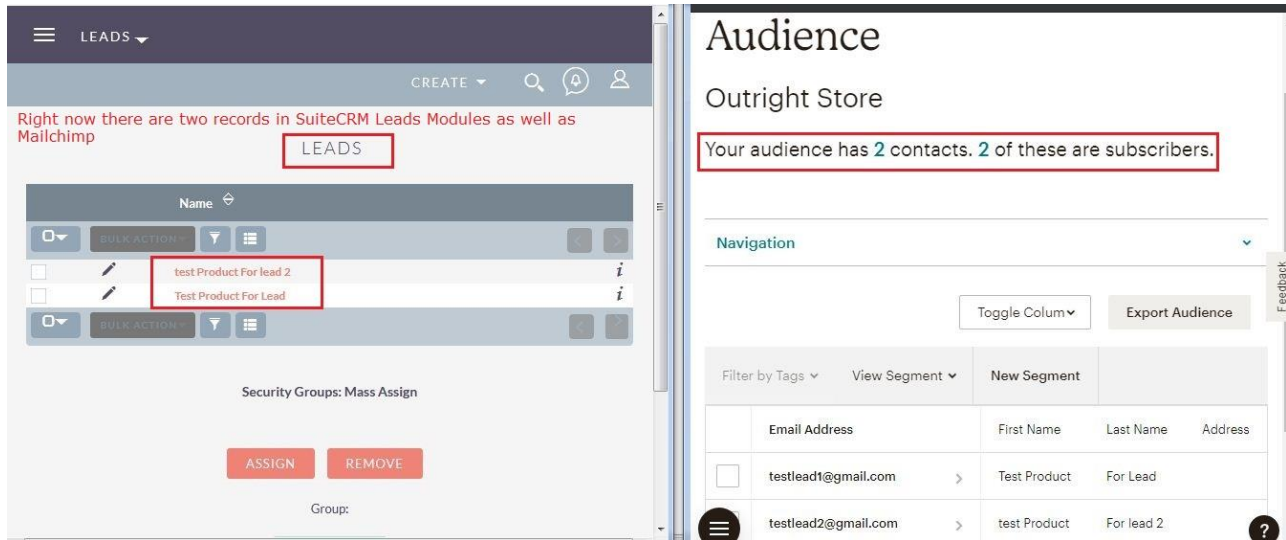
Adam Owner
CRM Software

- Notifications
- Profile
- Account
- Hire an expert
- Log Out
- Privacy and Terms

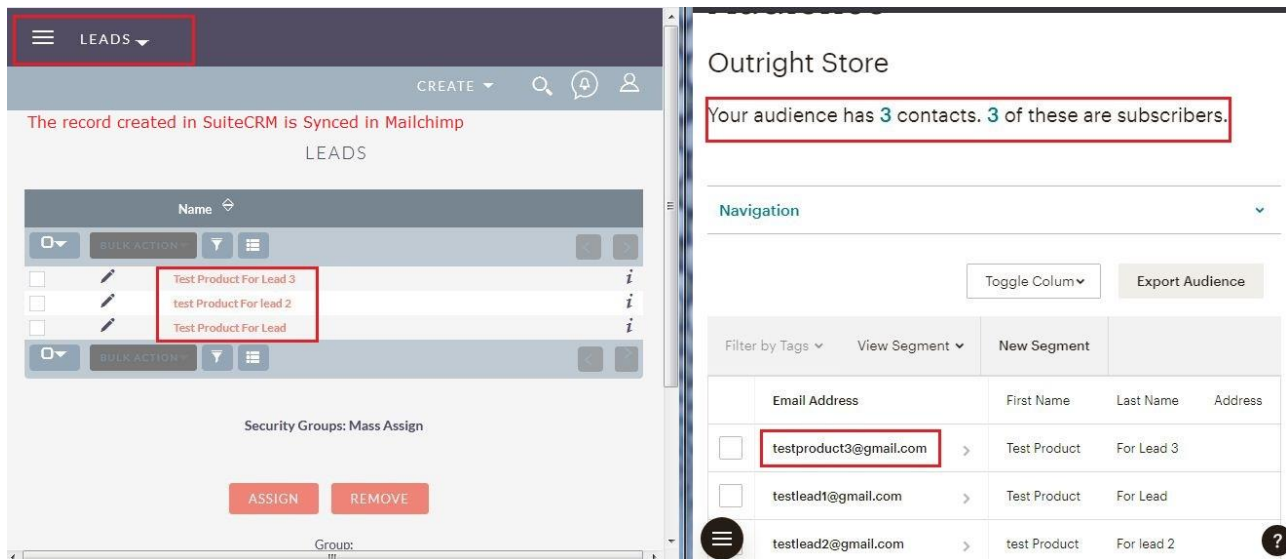
jeff Owner
Outright Store

- Notifications
- Profile
- Account
- Hire an expert
- Log Out
- Privacy and Terms

9. Currently there are two records in SuiteCRM Leads Modules and Mailchimp.



10. We Created a record in Leads Modules and it is automatically synced in Mailchimp.



11. In the other Mailchimp Account there are two records in audience list. In SuiteCRM as well, there are two records in Contact Module.

CRM Software

Your audience has 2 contacts. 2 of these are subscribers.

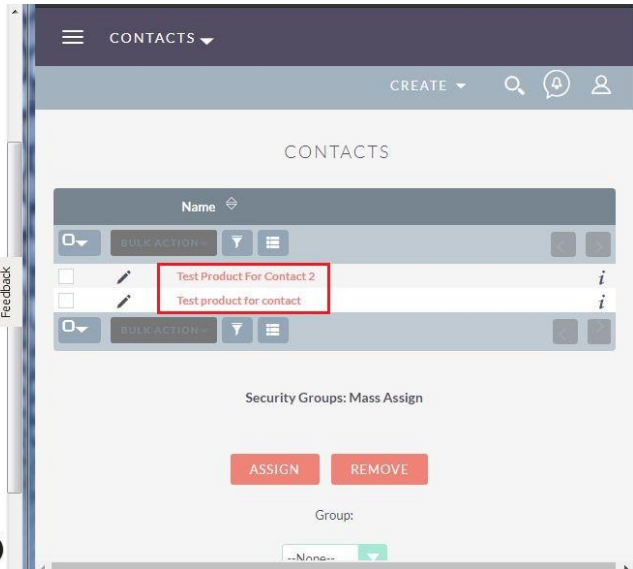
Overview **Manage contacts** Add contacts Signup forms

Preferences center Settings Inbox Surveys

There are two records in Contacts Module and Mailchimp Audience List

Filter by Tags View Segment New Segment

	Email Address	First Name	Last Name	Address	Phc
<input type="checkbox"/>	testcontact2@gmail.com	Test Product	For Contact 2		
<input type="checkbox"/>	testcontact1@gmail.com	Test product	for contact		



12. Now add a contact in Mailchimp. As you can see it's automatically synced in SuiteCRM.

Your audience has 3 contacts. 3 of these are subscribers.

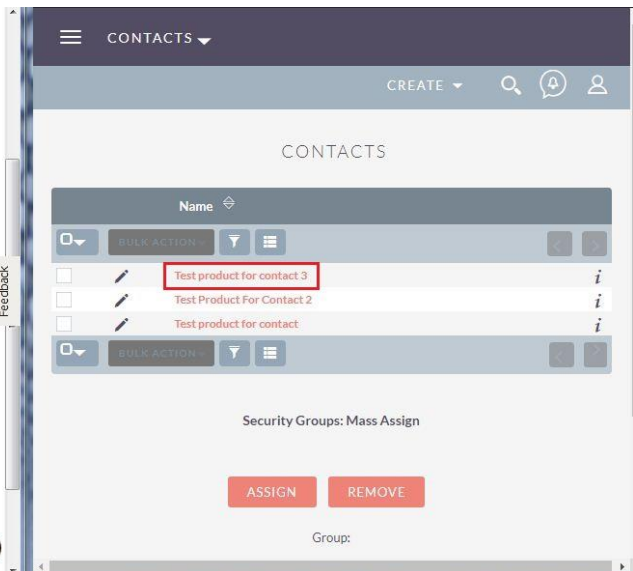
Overview **Manage contacts** Add contacts Signup forms

Preferences center Settings Inbox Surveys

Record created in Mailchimp is Synced in SuiteCRM Instantly

Filter by Tags View Segment New Segment

	Email Address	First Name	Last Name	Address	Phc
<input type="checkbox"/>	testcontact3@gmail.com	Test product	for contact 3		
<input type="checkbox"/>	testcontact2@gmail.com	Test Product	For Contact 2		
<input type="checkbox"/>	testcontact1@gmail.com	Test product	for contact		



13. Create a custom field in signup forms in Mailchimp.

The screenshot shows the Mailchimp contact profile for 'Test Product For Lead 3'. On the left is a yellow navigation sidebar with options like Audience, Signup forms, and Tags. The main content area includes a 'Write a Note' section with a text input field and an 'Add Note' button. Below that is an 'Activity Feed' showing a record from May 24th: 'Added via API'. A red box highlights the text 'Create a custom field in Mailchimp Signup Forms' within this activity. To the right, the 'Profile Information' section lists fields like Email Address, First Name, Last Name, Address, Phone Number, Birthday, and several 'Untitled' fields. The 'title' field is highlighted with a red box.

14. Go to the admin panel and click on Mailchimp field mapper options. From here you can map the custom field in SuiteCRM.

The screenshot displays the 'MAILCHIMP FIELD MAPPER' interface. It has tabs for 'BASIC' and 'ACTIONS'. Under 'BASIC', there are fields for Name (set to 'Field mapper for lead'), Assigned to (set to 'admin'), Select Source Module (set to 'Leads'), and Description. A red box highlights the 'MAILCHIMP MODULE FIELDS' section, which contains a table with columns for Name, Mailchimp Fields, Subscriber fields, and Date Modified. A row in the table shows 'Test Field mapper' mapped to 'TITLE' in Mailchimp, which is further highlighted with a red box. The 'title' field in the SuiteCRM profile information from the previous screenshot is also highlighted with a red box to show the mapping.

15. The custom field is also Synced in SuiteCRM.

Open rate Click rate
— —
Total revenue Average order value
Connect your store to get order data.

Profile Information

Email Address testproduct3@gmail.com
First Name Test Product
Last Name For Lead 3
Address —
Phone Number —
Birthday —
Untitled —
Untitled —
Untitled —
title Test Custom Field

LEADS

The Custom field we created in Mailchimp is synced in SuiteCRM

Name	Status	Job Title	Account Name	Office Phone
<input type="checkbox"/> Test Product For Lead 3	New			
<input type="checkbox"/> test Product For lead 2	New			
<input type="checkbox"/> Test Product For Lead	New			

Security Groups: Mass Assign ASSIGN REMOVE Group: --None--

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