



SugarCRM Mailchimp Integration (Premium)

# User Guide

## User Guide:-

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

Mailchimp Config

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 Product for Lead	*****	Leads	Leads	<input checked="" type="checkbox"/>	*****	<input checked="" type="checkbox"/>	outright SYSTEMS
<input type="checkbox"/> On	Test Product for Contact	*****	Contacts	Contacts	<input checked="" type="checkbox"/>	*****	<input checked="" type="checkbox"/>	Preeti Dwivedi

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

Test Product for Lead » Edit

Save Cancel View Audit Log Save and Continue (1 of 2) \* Indicates required field

Name: \* Test Product for Lead API Key: \*\*\*\*\*

Product Switch: On Assigned to: outright SYSTEMS

Unique ID: \*\*\*\*\*

Sync Settings

Sync CRM to MailChimp:

Sync MailChimp to CRM:

CRM modules to Sync: \* 

- Calls
- Emails
- Meetings
- Tasks
- Calendar
- Leads

Select Module: Leads

Save Cancel View Audit Log

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

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 Mailchimp Integration

Edit

Mailchimp CONNECTION

Copy webhook url from here

Mailchimp Conenction: **WEBHOOK URL : [http://sugarpro.outrightdev.link/pro10\\_2/index.php?entryPoint=outr\\_mailchimp\\_webhook\\_entrypoint](http://sugarpro.outrightdev.link/pro10_2/index.php?entryPoint=outr_mailchimp_webhook_entrypoint)**



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Account Type: Outright Store  
Username: jeffbezos95  
Company: Outright Store  
5560 Progress Rd, United States, Indianapolis, IN, 46241-4324, US

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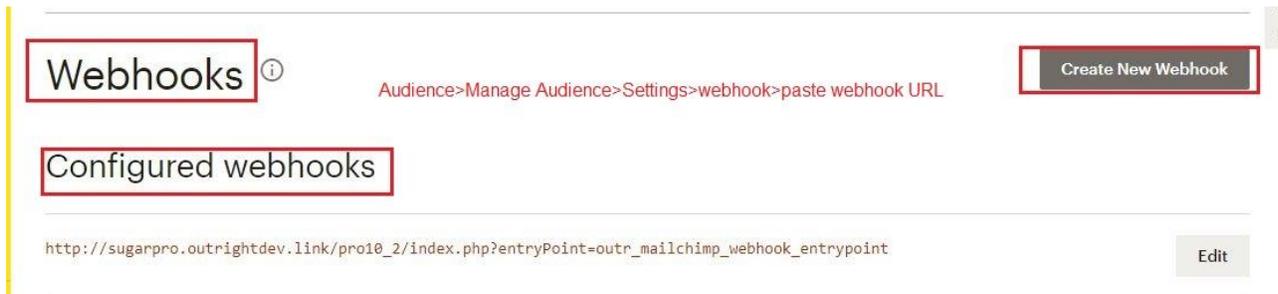
[Sync CRM to Mailchimp](#) [Get campaigns from Mailchimp](#) [Sync Mailchimp to CRM](#)

Name: Test Mailchimp Integration

Product Switch: Off

API Key: \*\*\*\*\*

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 SugarCRM 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 Product for Lead	*****	Leads	Leads	<input checked="" type="checkbox"/>	*****	<input checked="" type="checkbox"/>	outright SYSTEMS
<input type="checkbox"/> On	Test Product for Contact	*****	Contacts	Contacts	<input checked="" type="checkbox"/>	*****	<input checked="" type="checkbox"/>	Preeti Dwivedi

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

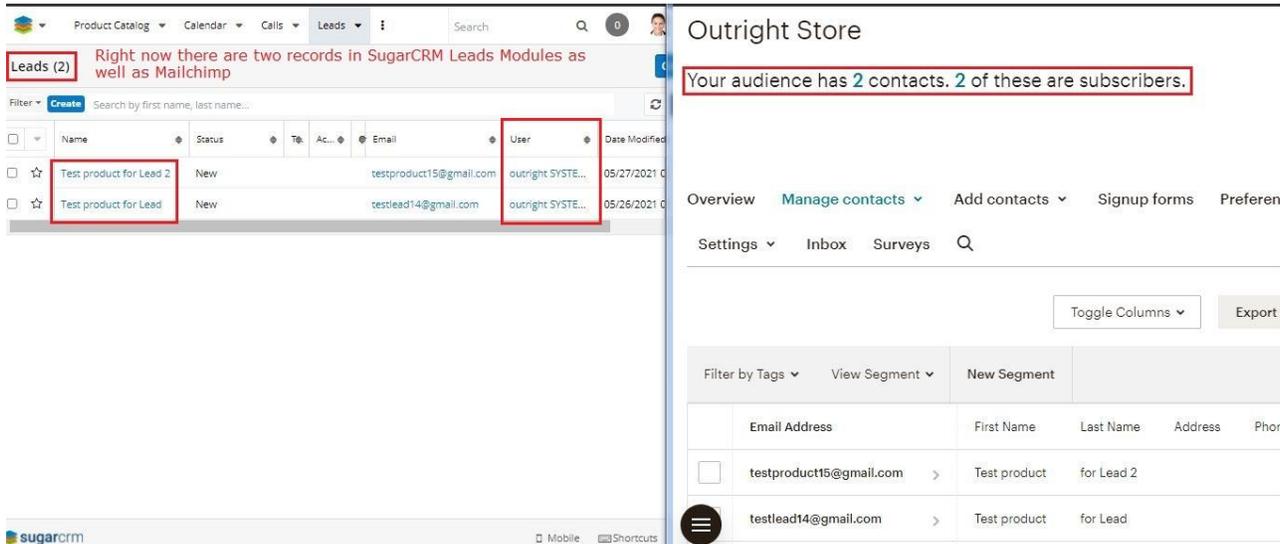
Hire an expert

Log Out

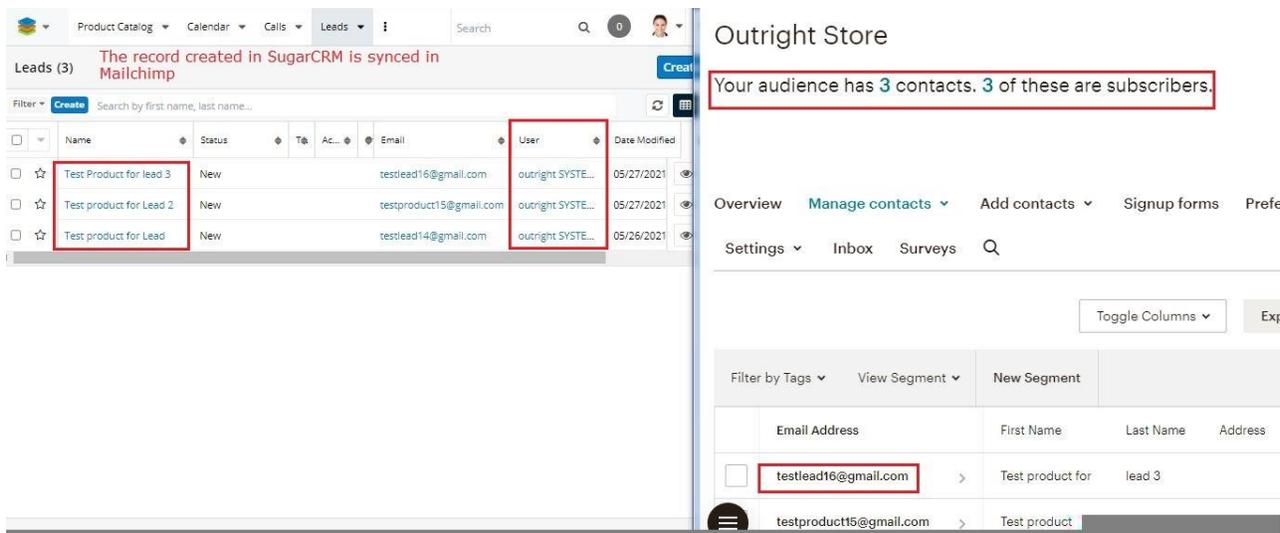
[Privacy and Terms](#)

Feedback

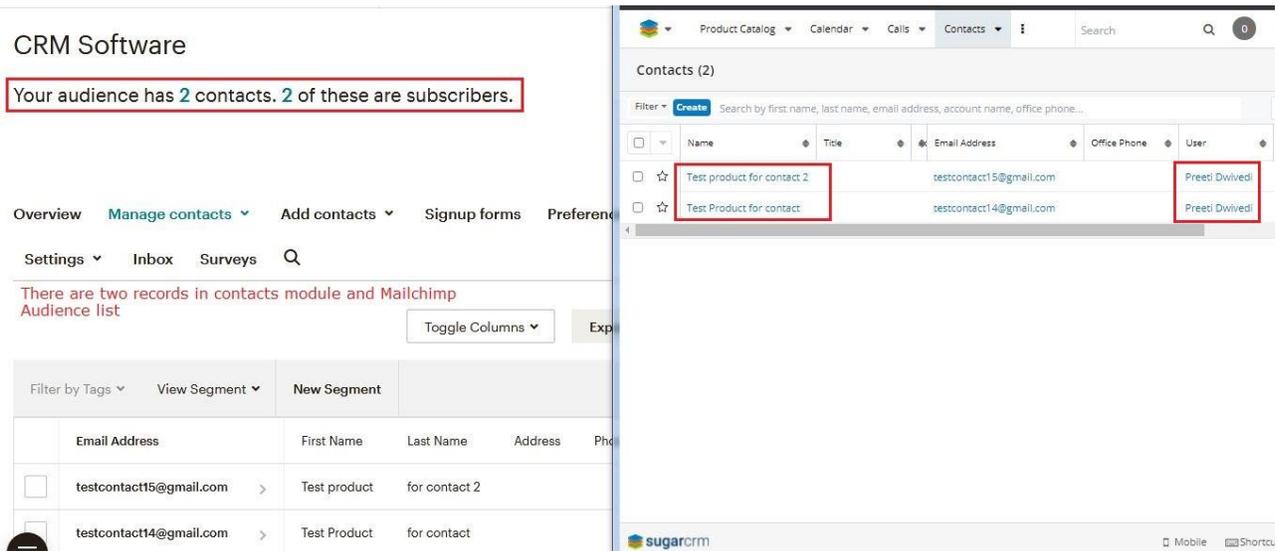
9. Currently there are two records in SugarCRM Leads Modules and Mailchimp.



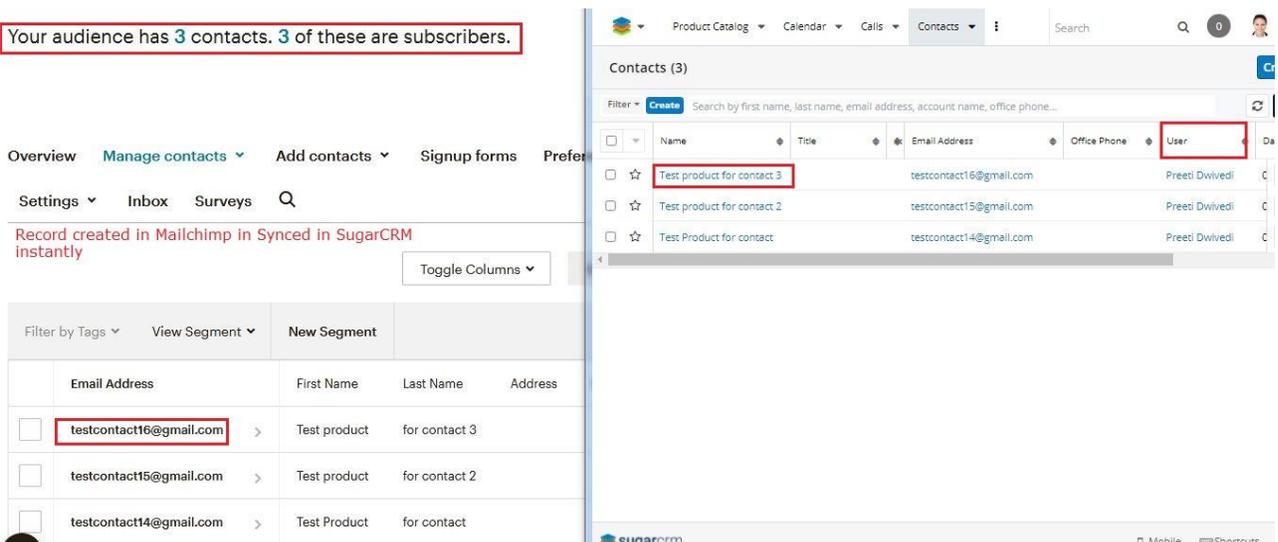
10. We Created a record in Leads Modules and it is automatically synced in Mailchimp.



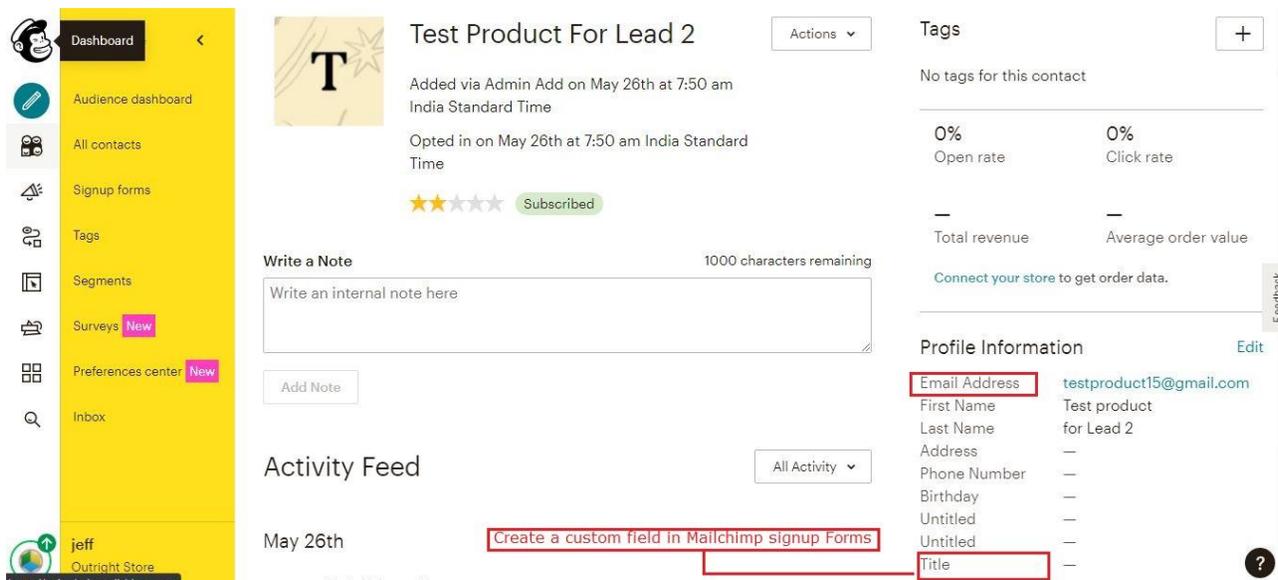
11. In the other Mailchimp Account there are two records in audience list. In SugarCRM as well, there are two records in Contact Module.



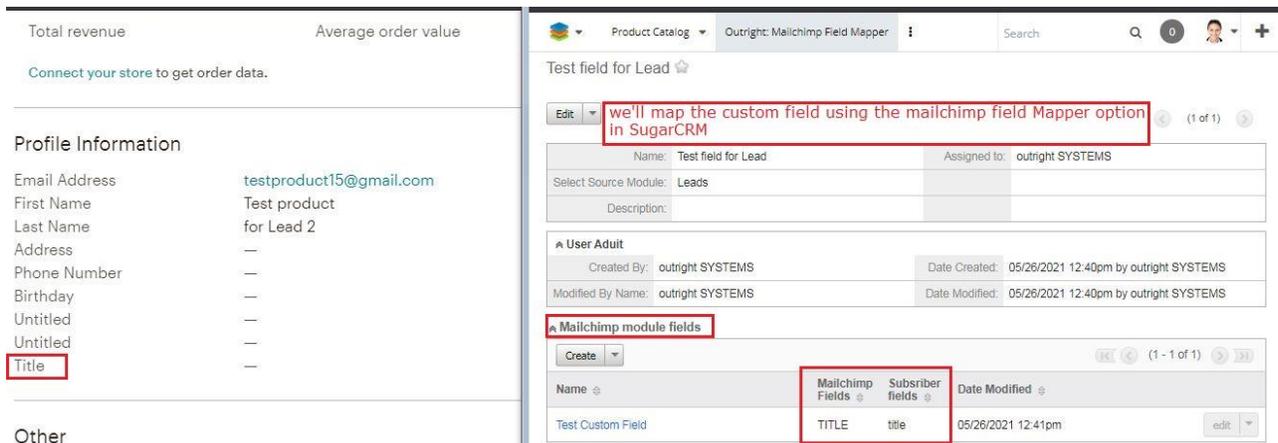
12. Now add a contact in Mailchimp. As you can see it's automatically synced in SugarCRM.



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



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



15. The custom field is also Synced in SugarCRM.

The screenshot displays the SugarCRM interface. On the left, the 'Profile Information' section shows fields for Email Address, First Name, Last Name, Address, Phone Number, Birthday, and Title. The 'Title' field contains the value 'Sync from Mailchimp'. On the right, the 'Leads' table is visible, showing two leads. The first lead, 'Test product for Lead 2', has a 'Title' field with the value 'Sync from Mailchimp'. A red box highlights this value in the table. Another red box highlights the text 'The custom field we created in Mailchimp is Synced in SugarCRM' at the top of the table. A third red box highlights the 'Sync from Mailchimp' value in the 'Title' field of the first lead row. The table columns include Name, Status, Title, Account, Email, User, and Date.

Name	Status	Title	Account	Email	User	Date
Test product for Lead 2	New	Sync from Mailchimp		testproduct15@gmail.com	outright SYSTE...	
Test product for Lead	New			testlead14@gmail.com	outright SYSTE...	