

SugarCRM Mailchimp Integration (Premium)

# **User** Guide

**Mailchimp Integration** 

# **User Guide:-**

#### **1.** Go to the admin panel and click on "Mailchimp config" option.

Name		My Items 🗌 Search	Clear Advance	d Search					(
Dei Dei	lete 👻								) (1 - 2 of 2) 🕥 河
	Product Switch	⇔ Name ⇔	Unique ID 👙	Select Module (	CRM modules to Sync	Sync MailChimp to CRM	⇔ API Key ⇒	Sync CRM to MailChimp	
0 😭 🥝	) On	Test Product for Lead	******	Leads	Leads		*****		outright SYSTEMS
0 🎡 🥝	) On	Test Product for Contact	*******	Contacts	Contacts	12	**********	10	Preeti Dwivedi

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

Save Cancel View Audit	t Log				Save and Continue	(1 of 2) () * Indicates required fie
Name: *	Test Product for Lead	API Key:	*********	*		
Product Switch:	On 🛩	Assigned to:	outright SYSTEMS	$F \times$		
Unique ID:	******					
Sync CRM to MailChimp:		CRM modules to Sync: *	Calls Emails Meetings	-		
			Tasks Calendar			
			Leads	-		
Sync MailChimp to CRM:		Select Module:	Leads	~		

**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 ceeping API keys secure.	to your Mailchimp account, so	keep them safe.	Tips on		
Created	User	Label	API key	QR Code	Status
May 04, 2021 1:36 am	jeff bezos95 (owner)	none set	*****	QR	
Create A Key			Copy API Key from Mailchimp		

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

ailchimp CONNECTIO	N	Copy webhook url from here	
	Mailchimp Conenction: WEBHOO entryPoint	K URL : http://sugarpro.outrightdev.link/pro10_2/indet t=outr_mailchimp_webhook_entrypoint	1 1 7 2021-05-07 0 Sync Mailchimp to CRM
Name:	Test Mailchimp Integration	API Key: ****	*****
	1000 100 100 100 100 100 100 100 100 10		

**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.

Unique id for audience Outright Store

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**Mailchimp Integration** 

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

			wo separate :	settings for two un	referic Marching ac	counts		
Name	My Items 🗍 Search	Clear Advance	d Search					
Delete 💌								(1 - 2 of 2)
Product S	witch 👳 Name 👳	Unique ID  \operatorname{blue}	Select Module	CRM modules to Sync	Sync MailChimp to CRM		Sync CRM to MailChimp	Assigned to
🗆 🏫 🥝 On	Test Product for Lead	*****	Leads	Leads		*****		outright SYSTEMS
🗆 🎡 🥝 On	Test Product for Contact	*******	Contacts	Contacts	61	******	8	Preeti Dwivedi

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

Two separate Mailchimp Accounts		
A Adam Owner CRM Software	jeff Owner Outright Store	$\otimes$
Notifications	Notifications	>
Profile	Profile	
Account	Account	
Hire an expert	Hire an expert	back
Log Out	Log Out	Feed
Privacy and Terms	Privacy and Terms	

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

• ،	Pro	duct Catalog 👻	C	alendar 💌	Calls	•	Leads	•	I	Search		Q	•	2	Outright Store				
Lead	S (2) Create	Right now well as Ma	i thaile	nere are chimp ; last name	two	rec	ords i	in S	SugarCRM	Leads	Modules a	as	1		Your audience has 2 contacts.	2 of these a	e subscribe	ers.	
-	Name		٠	Status	٠	TØ.	Ac 🔶	e e	Email	٠	User	٠	Date Modifie	ed					
0 \$	Test p	roduct for Lead 2	1	New				te	estproduct15@	gmail.com	outright SYST	re	05/27/2021	c					
0 \$	Test p	roduct for Lead		New				te	estlead14@gma	ail.com	outright SYST	re	05/26/2021	с	Overview Manage contacts *	Add contacts	<ul> <li>Signup for</li> </ul>	orms F	referen
																	Toggle Columr	15 ¥	Export
															Filter by Tags 👻 View Segment 🛩	New Segment			
															Email Address	First Name	Last Name	Address	Phor
															testproduct15@gmail.com	Test product	for Lead 2		
🛢 sug	<b>jar</b> crm										🛛 Mobi	ile	□ Shortcuts		testlead14@gmail.com	Test product	for Lead		

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

- 1	Product Catalog 👻	Calendar 👻	Calls 👻	Leads	• 1	Search	٩	•	-	Outright Store	
Leads	(3) The record Mailchimp	created	in Suga	arCRM is	s synced	l in			Creat	Your audience has 3 contacts, 3 of these are subscribers.	
Filter *	Create Search by first na	me, last name.						0			
•	Name	Status	ф Т	f <b>e</b> Ac •	🗣 Email	٠	User 🔶	Date Modifi	ed		
	Test Product for lead 3	New			testlead	116@gmail.com	outright SYSTE	05/27/2021	۲		
	Test product for Lead 2	New			testproc	duct15@gmail.com	outright SYSTE	05/27/2021	۲	Overview Manage contacts v Add contacts v Signup forms P	refe
0 \$	Test product for Lead	New			testlead	114@gmail.com	outright SYSTE	05/26/2021	۲	Contribution of the Community of Community o	
										Toggle Columns ♥	Exp
										Filter by Tags View Segment View Segment	
										Email Address First Name Last Name Addre	ess
										testlead16@gmail.com > Test product for lead 3	
									_	testproduct15@gmail.com > Test product	

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

CRM Software			s -	Product Catalog 👻	Calendar 👻 Calls	▼ Contacts ▼ I	Search	۹ 💿
Your audience has 2 contacts.	2 of these are subscribers.		Filter + C	reate Search by first nam	ie, last name, email ad	idress, account name, office pho	ne	
				Name 🔶	Title •	🔹 Email Address	Office Phone	• User •
			0 \$	Test product for contact 2		testcontact15@gmail.com		Preeti Dwivedi
Overview Manage contacts *	Add contacts 👻 Signup forms 🛛	Preference	0 \	Test Product for contact		testcontact14@gmail.com		Preeti Dwivedi
There are two records in contacts Audience list	module and Mailchimp Toggle Columns ¥	Exp						
Filter by Tags 👻 View Segment 👻	New Segment							
Email Address	First Name Last Name Addres	ss Pho						
testcontact15@gmail.com	Test product for contact 2							
testcontact14@gmail.com	Test Product for contact		🍺 sugar	crm			IJ	🛛 Mobile 🔤 Shorto

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

Your audience has 3 contacts	. 3 of these ar	e subscriber	ſS.		Product Catalog	▼ Calendar ·	Calls 👻	Contacts 👻 🚦		Search	Q	0	2	
						Contacts (3)								
					Filter * Create Search by first name, last name, email address, account name, office phone								C	
Overview Manage contacts ×	Add contacts Y	Signup for	ms Prefe	0 -	Name	• Title	• •	k Email Address	(	Office Phone	Ø User		Di	
o to the manage contacts	And Contacto	olgridp for	110101	□ ☆	Test product for co	ntact 3		testcontact16@gmail.c	m		Preet	i Dwivedi	C	
Settings Y Inbox Surveys	Q			0 \$	Test product for co	ntact 2		testcontact15@gmail.c	om		Preet	i Dwivedi	с	
Record created in Mailchimp in S	ynced in SugarC	RM			Test Product for co	ntact		testcontact14@gmail.c	m		Preet	i Dwivedi	с	
historiciy		Toggle Colu	mns 🗸	4										
Filter by Tags ➤ View Segment ➤	New Segment													
Email Address	First Name	Last Name	Address											
testcontact16@gmail.com	Test product	for contact 3												
testcontact15@gmail.com	Test product	for contact 2												
testcontact14@gmail.com >	Test Product	for contact		Sug	arcrm						Mohile	m Short	ruts	

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

62	Dashboard <	/11-M	Test Product For Lead 2	Actions 🗸	Tags	+
	Audience dashboard	Tra	Added via Admin Add on May 26th at 7:50 India Standard Time	) am	No tags for this con	tact
	All contacts		Opted in on May 26th at 7:50 am India Sta Time	andard	0% Open rate	0% Click rate
Q.	Signup forms		Subscribed			
Ŷ	Tags				Total revenue	Average order value
	Segments	Write a Note Write an internal r	ote here	1000 characters remaining	Connect your store	to get order data.
台	Surveys New			2	Profile Informati	ee g
88	Preferences center New	Add Note			Email Address	testproduct15@gmail.com
Q	Inbox				First Name	Test product
			l	100 . 17. 20	Address	-
		ACTIVITY Fee	ed	All Activity V	Phone Number	-
					Birthday	-
	inff	May 26th	Create a custom field in Ma	ailchimp signup Forms	Untitled	_
	Outright Store				Title	- ?

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

Total revenue	Average order value	😻 🔹 Product Catalog 💌 Outright: Mailchimp Field Mapper	r I Search Q 🗿 🤶 🕂
Connect your store to g	get order data.	Test field for Lead 🎡	
Profile Information		Edit Ve'll map the custom field using the in SugarCRM	1e mailchimp field Mapper option 🔬 (1 of 1) 🕥
		Name: Test field for Lead	Assigned to: outright SYSTEMS
Email Address	testproduct15@gmail.com	Select Source Module: Leads	
First Name	Test product	Description:	
Last Name	for Lead 2		
Address			
Phone Number	-	Created By: outright SYSTEMS	Date Created: 05/26/2021 12:40pm by outright SYSTEMS
Birthday	-	Modified By Name: outright SYSTEMS	Date Modified: 05/26/2021 12:40pm by outright SYSTEMS
Untitled	-	Mailchimp module fields	
Untitled			
Title	—	Create 💌	( <u>ic</u> ( <u>c</u> ) (1-1 of 1) ( <u>&gt;</u> )>)
		Name ⇔ Mailchimp Fields ⇔	Subsriber fields
Othor		Test Custom Field TITLE	title 05/26/2021 12:41pm edit *

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Outright

#### **15.** The custom field is also Synced in SugarCRM.

_			-	Pro	duct Catalog 👻	Calendar		ads •	• 1		Search	Q	0	R	•	+
Total revenue	Average order value	Leads (2)			The custom field we created in Mailchimp is Synced in SugarCRM									Cr	eate	
Connect your store to get order data.		Fil	Filter   Create Search by first name, last name											0	⊞	0
		- 0	*	Name	٠	Sta ø	Title	•	Ac \$	•	Email .	User	4	D	a	ø
Profile Information		0	☆	Test pr	oduct for Lead 2	New	Sync from Mailchir	mp			testproduct15@gmail.com	outri	ght SYSTE		۲	•
Email Address	testproduct15@gmail.com	D	습	Test pr	oduct for Lead	New					testlead14@gmail.com	outri	ght SYSTE		۲	•
First Name	Test product	•														Þ
Last Name	for Lead 2															
Address																
Phone Number																
Birthday																
Untitled																
Untitled																
Title	Sync from Mailchimp															