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 ⇕
☐ ☆ ⊘	On		Test Product for Lead	**************	Leads	Leads	☑	***********************************	☑	outright SYSTEMS
☐ ☆ ⊘	On		Test Product for Contact	**************	Contacts	Contacts	☑	***********************************	☑	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: ☑   CRM modules to Sync: *   Calls
                                                                            Emails
                                                                            Meetings
                                                                            Tasks
                                                                            Calendar
                                                                            Leads
Sync MailChimp to CRM: ☑   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

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

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

Webhooks ⓘ   Audience>Manage Audience>Settings>webhook>paste webhook URL   Create New Webhook

Configured webhooks

http://sugarpro.outrightdev.link/pro10_2/index.php?entryPoint=outr_mailchimp_webhook_entrypoint   Edit
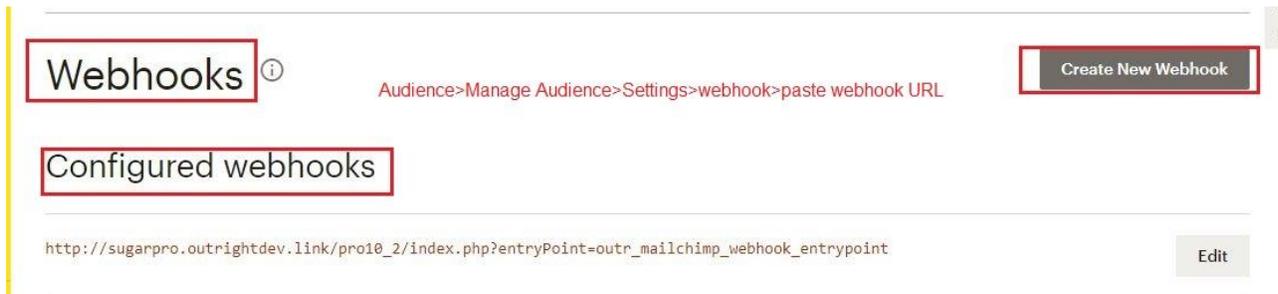
6. Copy the unique id from Mailchimp and paste it into SugarCRM Mailchimp Configuration setting.

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

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

9. Currently there are two records in SugarCRM Leads Modules and Mailchimp.
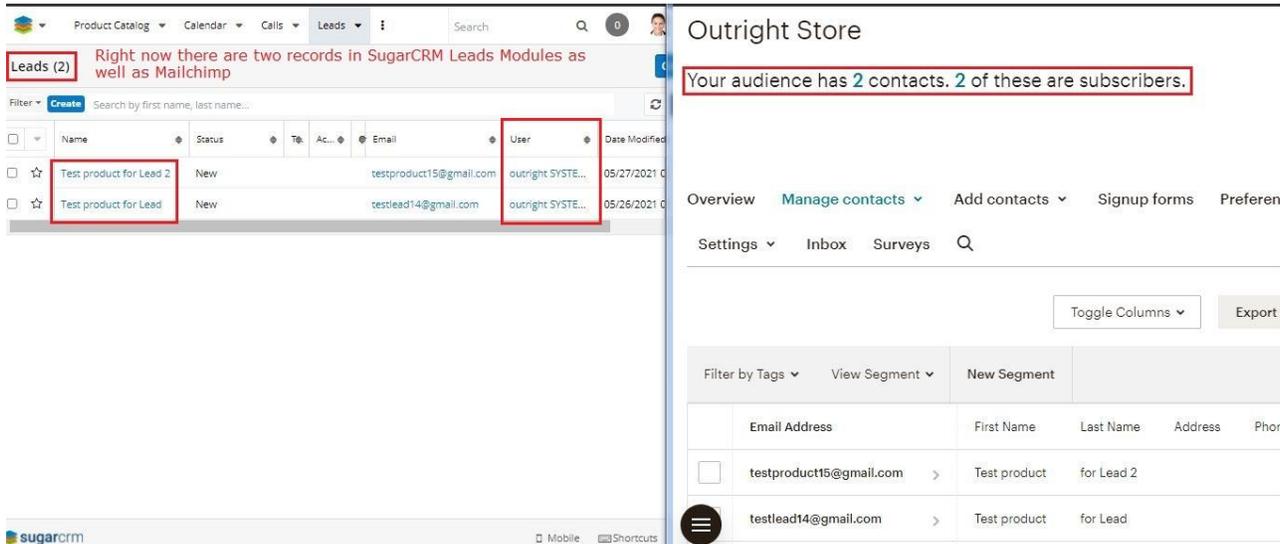
10. We Created a record in Leads Modules and it is automatically synced in Mailchimp.
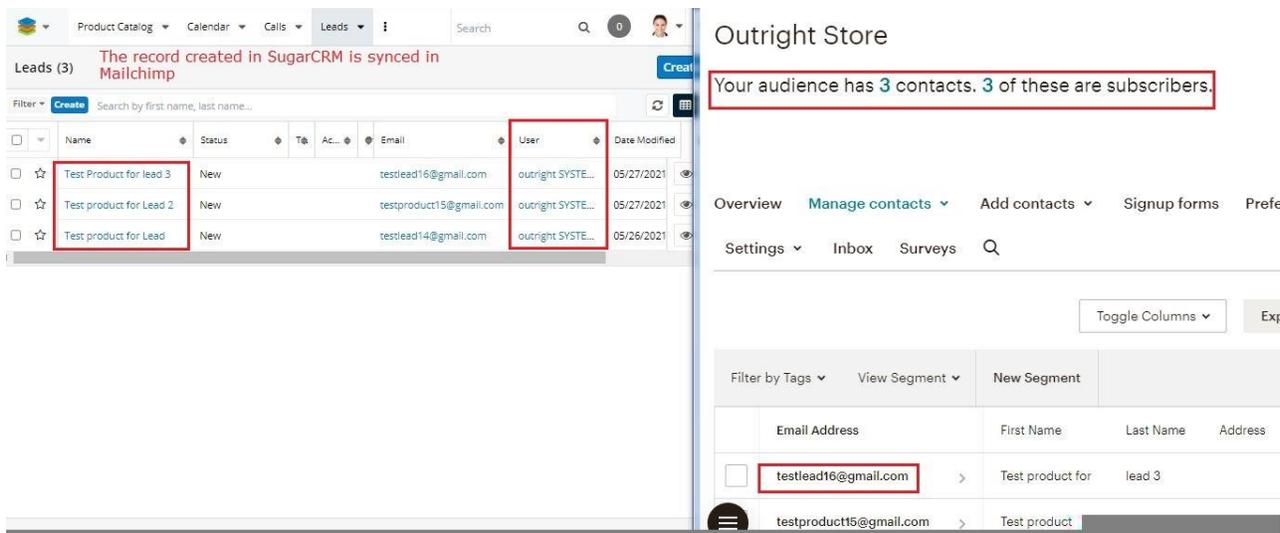
11. In the other Mailchimp Account there are two records in audience list. In SugarCRM as well, there are two records in Contact Module.
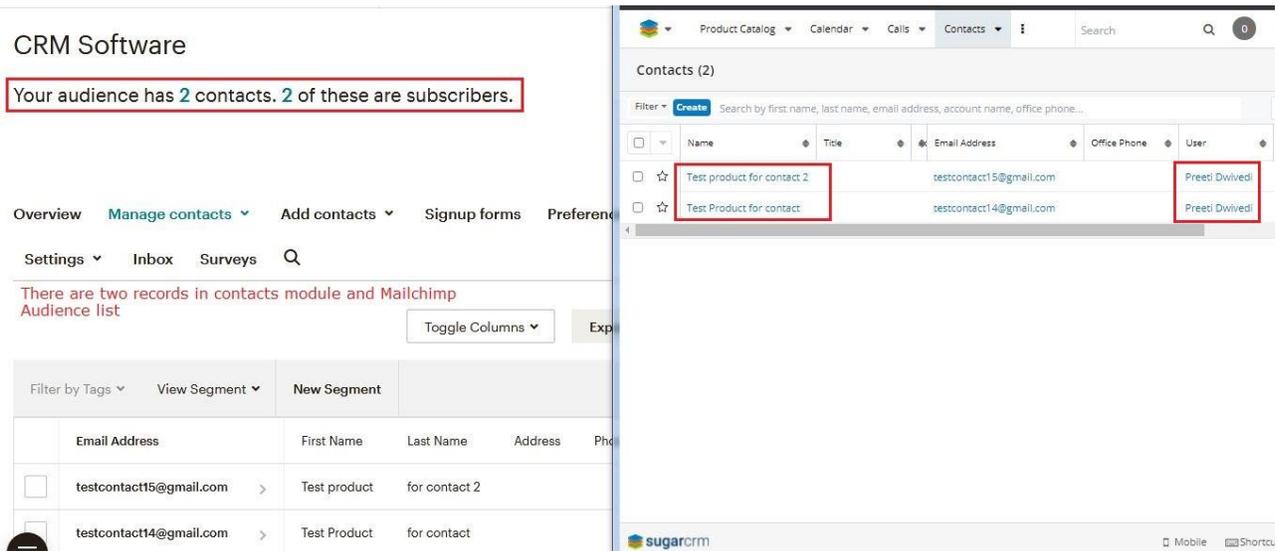
12. Now add a contact in Mailchimp. As you can see it's automatically synced in SugarCRM.
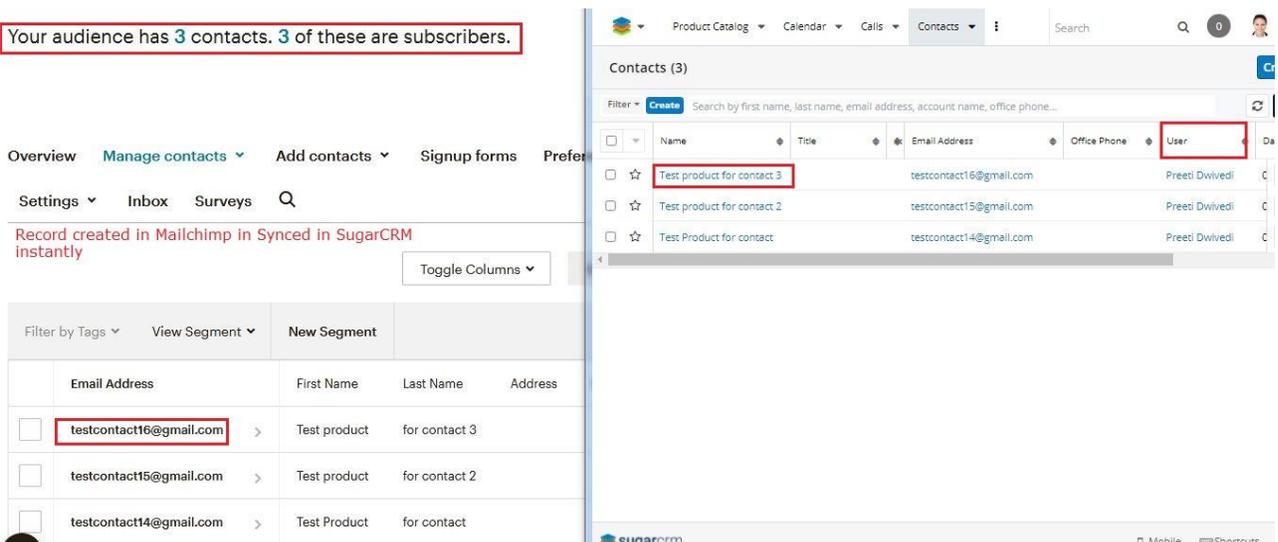
13. Create a custom field in signup forms in Mailchimp.
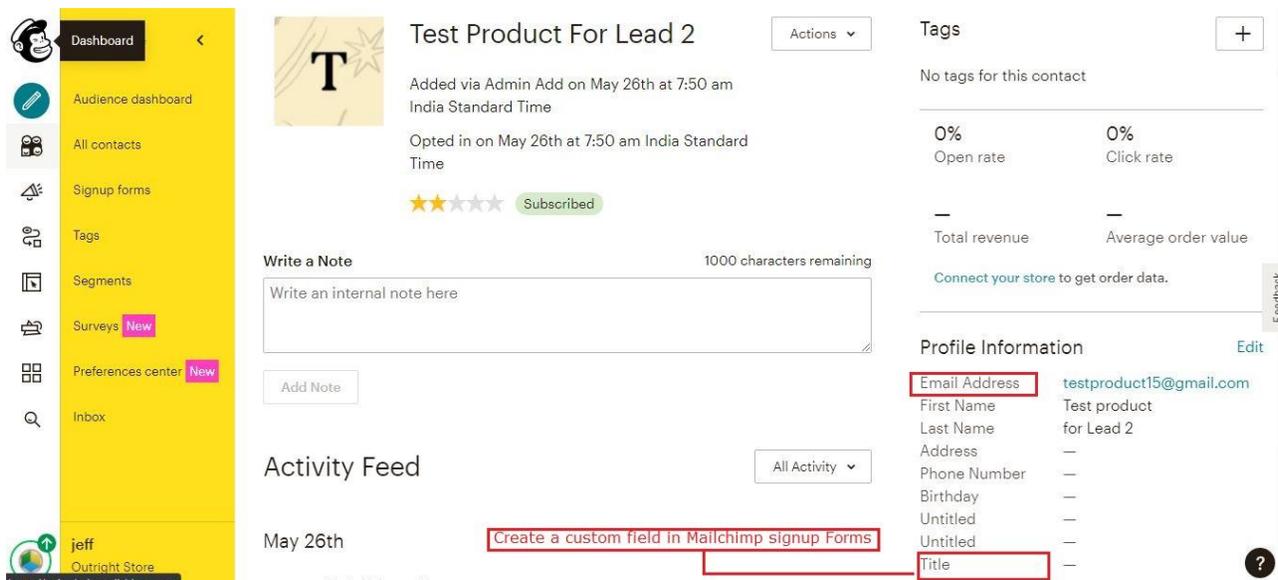
14. Go to the admin panel and click on Mailchimp field mapper options. From here you can map the custom field in SugarCRM.
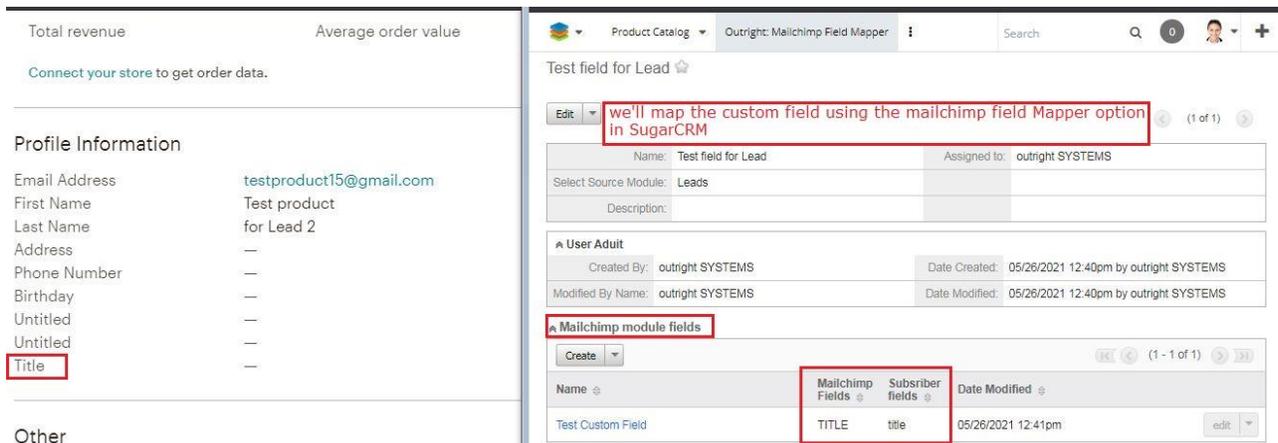
15. The custom field is also Synced in SugarCRM.