



Integrating MailChimp and Sage CRM

MailChimp is an email marketing solution that's integrated with Sage CRM to let you create online campaigns, send emails, and track results.

Integrating MailChimp with Sage CRM makes email marketing easier and more effective.

- There's no need for multiple contact databases – Sage CRM contacts are pushed to MailChimp.
- A new email campaign starts with Sage CRM and launches directly into MailChimp – no need to jump back and forth.
- Campaign results data from MailChimp is written back to the contact records in Sage CRM.
- An email service provider (ESP) protects your servers from potentially getting blacklisted.

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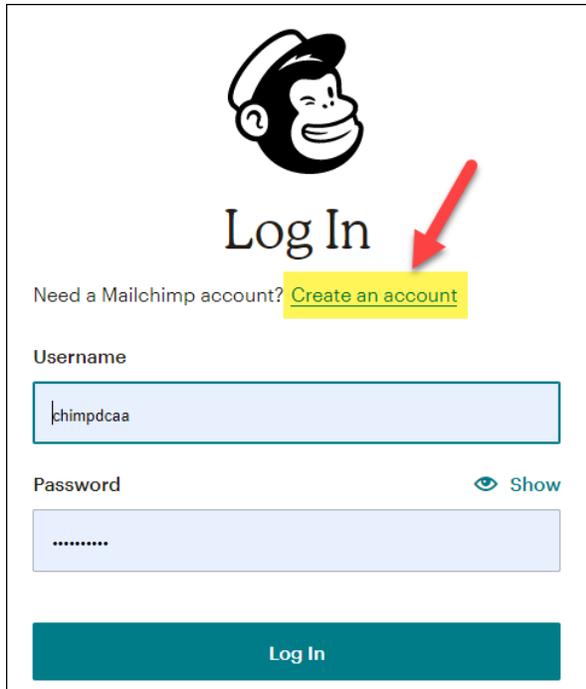
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1. MailChimp Set Up:

For a brief overview, please watch this video: <https://www.screencast.com/t/vdbkfc9Nci8w>

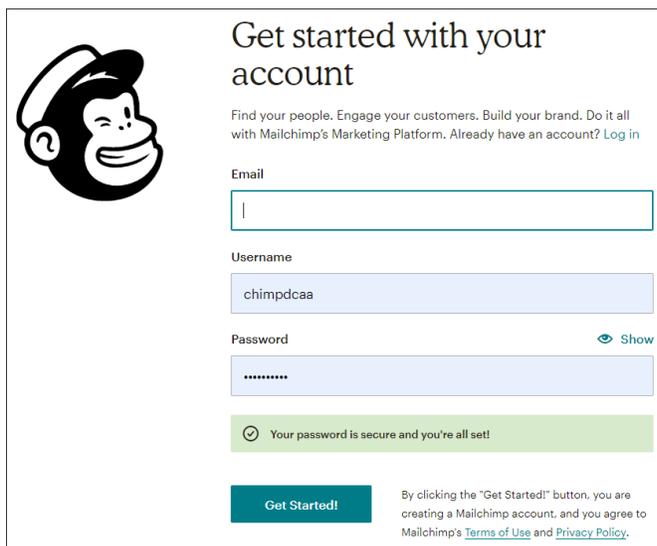
Log In/Create a MailChimp Account

If an account already exists, simply log in. If not, please select **Create an account** as follows:



The image shows the MailChimp login interface. At the top is the MailChimp monkey logo. Below it, the text "Log In" is displayed. A red arrow points to a link that says "Create an account" which is highlighted in yellow. Below this, there are input fields for "Username" (containing "chimpdcaa") and "Password" (masked with dots). A "Show" button is next to the password field. At the bottom is a teal "Log In" button.

Provide Email/Username/Password and select **Get Started!**



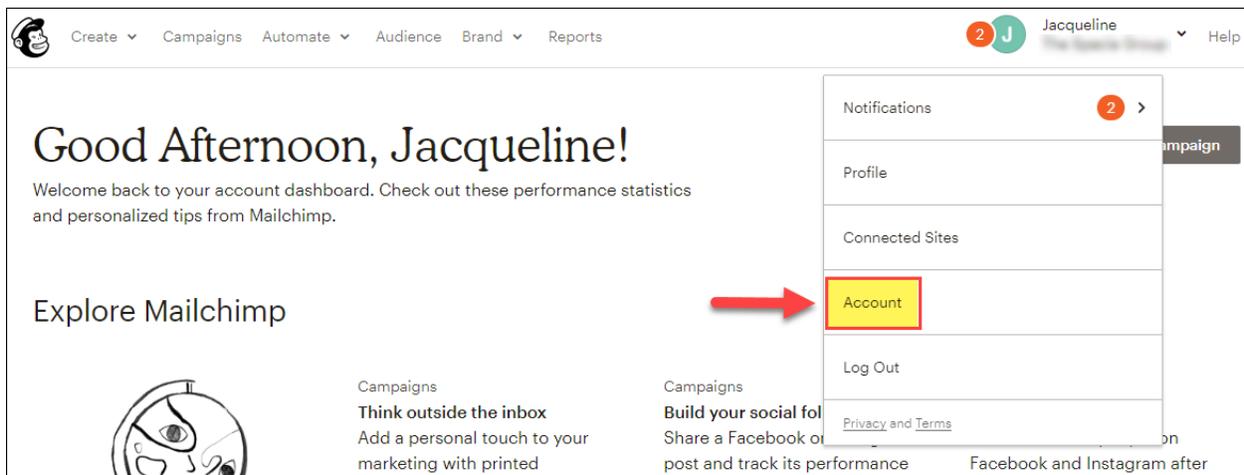
The image shows the "Get started with your account" screen. It features the MailChimp monkey logo on the left. The main heading is "Get started with your account". Below this is a sub-heading: "Find your people. Engage your customers. Build your brand. Do it all with Mailchimp's Marketing Platform. Already have an account? Log in". There are input fields for "Email", "Username" (containing "chimpdcaa"), and "Password" (masked with dots). A "Show" button is next to the password field. Below the password field is a green confirmation message: "✔ Your password is secure and you're all set!". At the bottom left is a teal "Get Started!" button. To the right of the button is a small disclaimer: "By clicking the 'Get Started!' button, you are creating a Mailchimp account, and you agree to Mailchimp's [Terms of Use](#) and [Privacy Policy](#)."

MailChimp Pricing

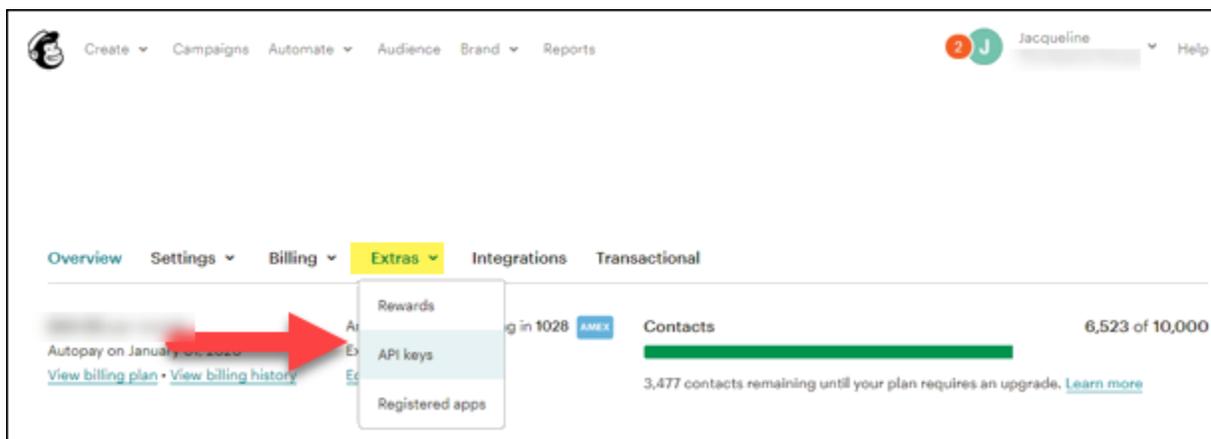
*There are three types of MailChimp pricing plan. On the free plan, you can send 12,000 emails to 2,000 subscribers per month. If you need to send more emails or have more subscribers, you can upgrade to a paid plan. For more information, see mailchimp.com/pricing/.

Create an API key

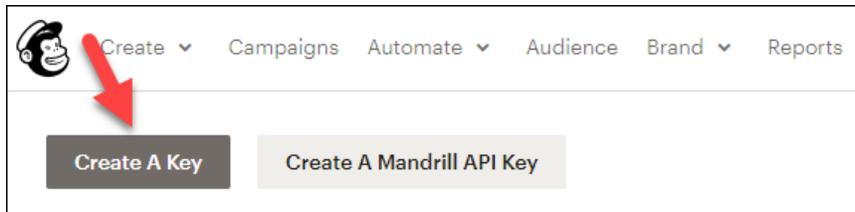
From the profile name, select **Account**:



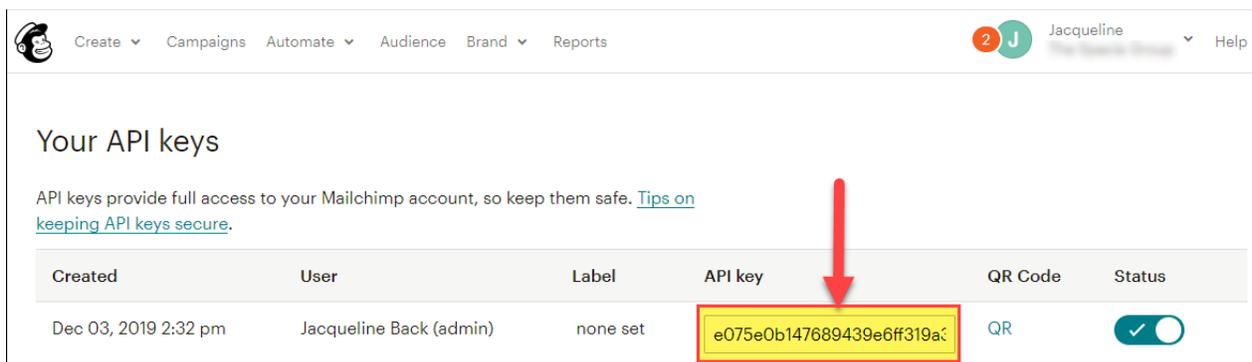
From **Extras** tab, select **API keys**:



Choose **Create A Key**:

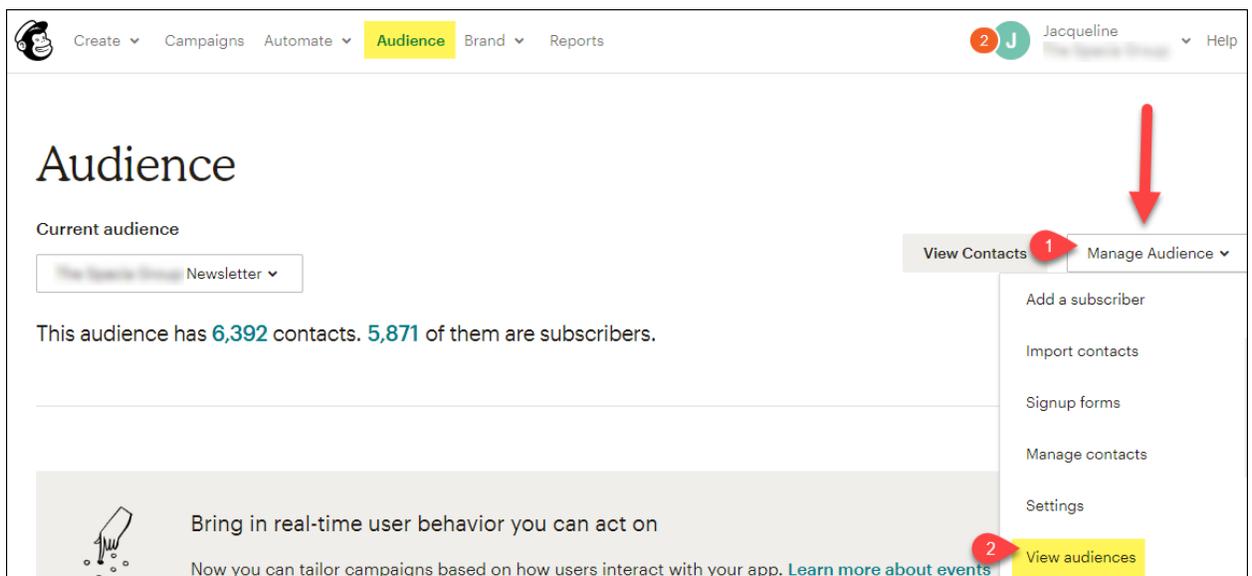


Copy API key (paste to Notepad)

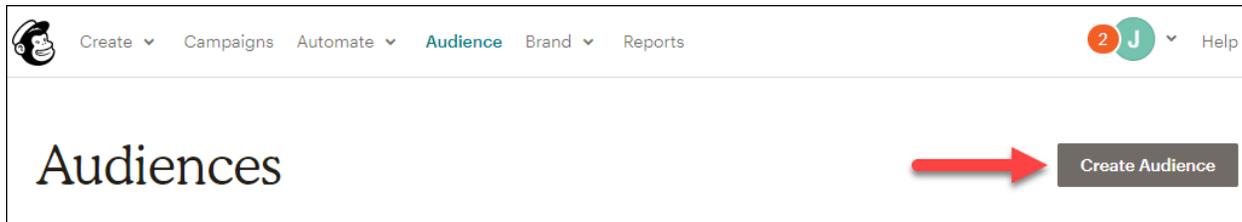


Create an Audience ID

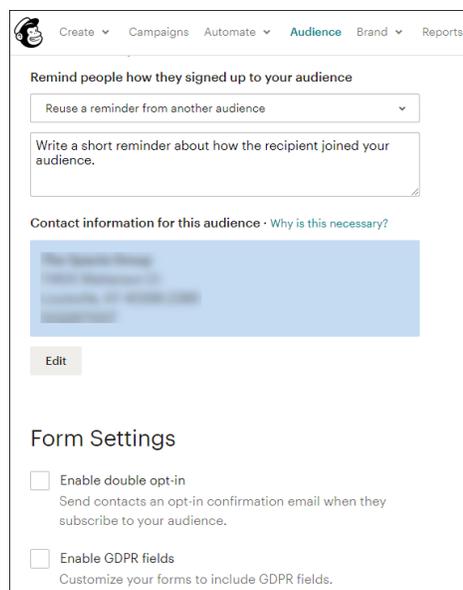
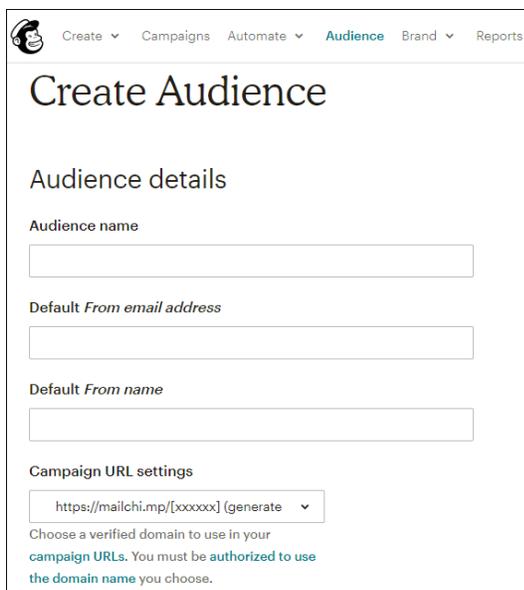
From **Audience** tab, select 1. **Manage Audience** and 2. **View audiences**:



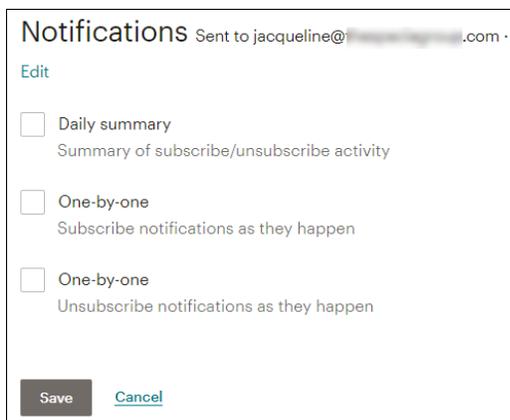
Select Create Audience



Add audience details:



Select Notifications setting(s) and Save.



New audience is confirmed:

The screenshot shows the top navigation bar with 'Audience' selected. A green notification box contains the text: "You have a brand new audience! When people join, say hi with an automated welcome email. **Set it up** in just a few clicks."

Choose **Settings** – Audience name and defaults:

The screenshot shows the 'Audience' settings page. The 'Settings' dropdown menu is open, with a red arrow pointing to the 'Audience name and defaults' option. Other options in the menu include 'Publicity settings'. The page title is 'Audience' and it shows '0 contacts'.

Copy Audience ID

The screenshot shows the 'Audience name and campaign defaults' page. The 'Audience ID' field is highlighted in yellow, with a red arrow pointing to it. The text next to it says: "Some plugins and integrations may request your Audience ID. Typically, this is what they want: **1decacfe18.**"

Delete all *|MERGE|* fields in MailChimp Audience

Stats ▾ Manage contacts ▾ Add contacts ▾ Signup forms Settings ▾ Q

Audience fields and *|MERGE|* tags

Here you can manage the fields available to your audience's [signup forms](#). Groups can also show up on signup forms but are edited on the audience's [groups](#) page.

Delete all *|MERGE|* fields in MailChimp Audience

Field label and type	Required?	Visible?	Put this tag in your content:	Default merge tag value
<input type="text" value="Email Address"/> email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	* EMAIL * or * MERGE0 *	
<input type="text" value="Address"/> address	<input type="checkbox"/>	<input type="checkbox"/>	* <input type="text" value="ADDRESS"/> * or * MERGE3 *	<input type="text" value="Default merge tag val"/>
<input type="text" value="Phone Number"/> phone	<input type="checkbox"/>	<input type="checkbox"/>	* <input type="text" value="PHONE"/> * or * MERGE4 *	<input type="text" value="Default merge tag val"/>



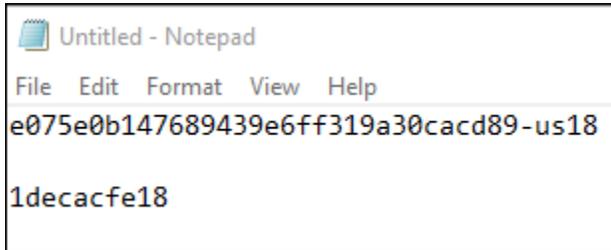
Are you sure? ✕

Deleting a form field also deletes all data in your list associated with it. Is that what you want to do? **(can't be undone)**

Type **DELETE** to confirm

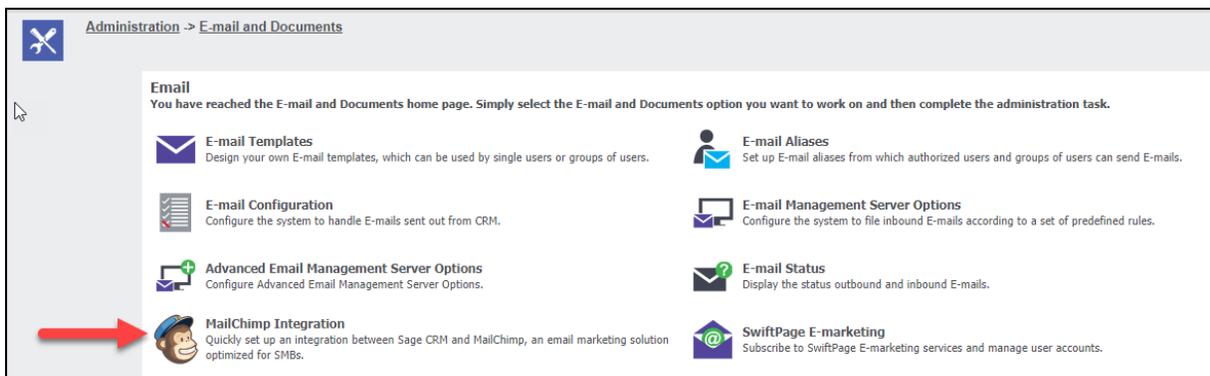
DeleteCancel

Paste to Notepad:



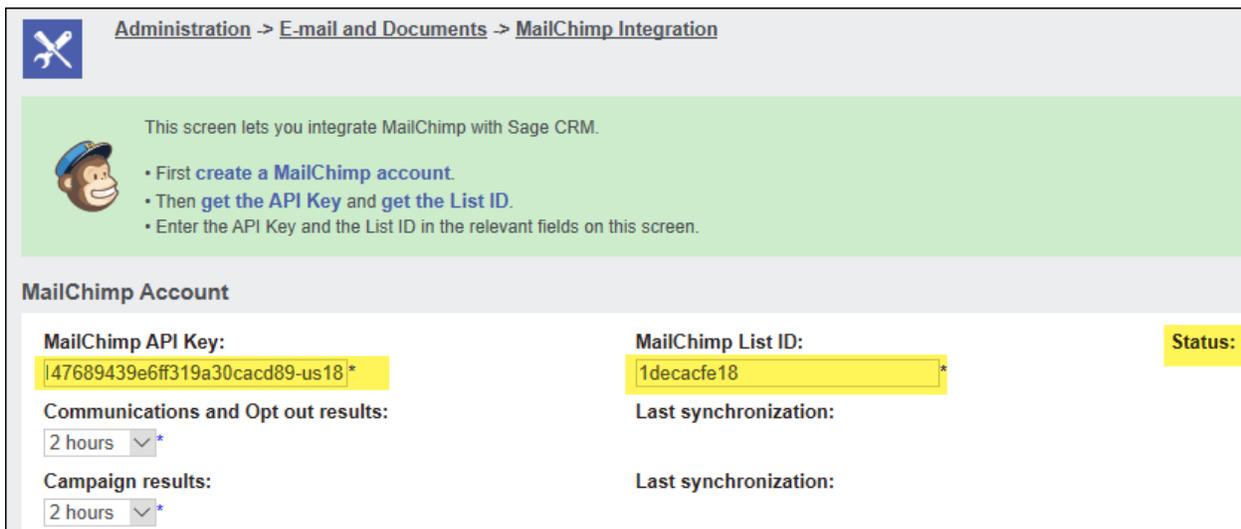
2. CRM Set Up:

Go to **Administration – Email and Documents**



Add API Key and Audience ID

Copy and Paste API Key and Audience ID (referred to as List ID in 2019 R1 and back) from Notepad –



Save.

Confirmation messages appears if MailChimp has successfully integrated with CRM:

 [Administration](#) -> [E-mail and Documents](#) -> [MailChimp Integration](#)

MailChimp has been successfully integrated with Sage CRM. 

 This screen lets you integrate MailChimp with Sage CRM.

- First [create a MailChimp account](#).
- Then [get the API Key](#) and [get the List ID](#).
- Enter the API Key and the List ID in the relevant fields on this screen.

MailChimp Account

<p>MailChimp API Key: e075e0b147689439e6ff319a30cacd89-us18</p> <p>Communications and Opt out results: 2 hours</p> <p>Campaign results: 2 hours</p>	<p>MailChimp List ID: 1decacfe18</p> <p>Last synchronization:</p> <p>Last synchronization:</p>	<div style="background-color: #fff9c4; padding: 5px; border: 1px solid #ccc;">Status: Enabled</div>
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Note: After you've integrated Sage CRM and MailChimp, you can change the Audience/List ID. If you change it to another Audience/List ID on the existing MailChimp account, all campaigns remain active. However, if you change it to an Audience/List ID on a different account, all campaigns are disabled and campaign statistics are not updated automatically or manually. You can't revert to the old Audience/List ID. This means that if campaigns are disabled, you can't re-enable them.

Enable MailChimp in the User Profile

Go to the individual user in the Administration – User section and choose Yes from Enable MailChimp:

Administration -> Users -> Users -> April Braun

Security

Profile Name: DCAA User Profile ▾	Mobile Device Access: True ▾
Password Never Expires: False ▾	Change p/w at Next Logon: False ▾
Password Expiry Date: 05/18/2018 19:11	My CRM Lists: All Users ▾
Reports: No Reports ▾	Solutions: No Access ▾
Restrict Sensitive Info: No Restriction ▾	Restrict Updates: No Restriction ▾
Merge persons/companies: Yes ▾	Assign Individual to Company: No ▾
Administration: System Admin ▾	Info Admin Rights: Info Admin Summary Reports Rights Info Admin Key Attribute Profiling Info Admin User Rights Info Admin Workflow and Escalation Rights Info Admin Extra Rights --None-- ▾
Mail Merge To Word: No ▾	Enable MailChimp: Yes ▾

Save.

User must have access to Lead entity (security profile).

3. Working with MailChimp and Sage CRM

Remember – you must be logged into your MailChimp account before you send from CRM to MailChimp.

Create Sage CRM Group

Create/access group to which email will be sent. Group name *cannot exceed 80 characters.*

Sage CRM Group must include **Email column** or **Send to MailChimp** button won't appear

The screenshot shows the Sage CRM Groups interface. At the top, there's a 'Groups' header. Below it, 'Group Details' are shown for a group named 'May16 MailChimp'. The details include: Name: May16 MailChimp, Type: Static Group, Entity: Person, Source View: Person Search, Description: Test Group, and Available To: All Users. Below the details is a table with 5 people. The table has columns: Exclude, Last Name, First Name, Company Name, Phone Full Number, Business E-mail, Territory, and Account. The 'Business E-mail' column is highlighted in yellow. Below the table, there are several action buttons: Save, Save As, Change, Delete, Cancel, Add Records to the Group, Merge to PDF, New Task, New E-mail, Export to File, Mass Update, Update Territory, **Send to MailChimp** (highlighted with a red arrow), and Include All.

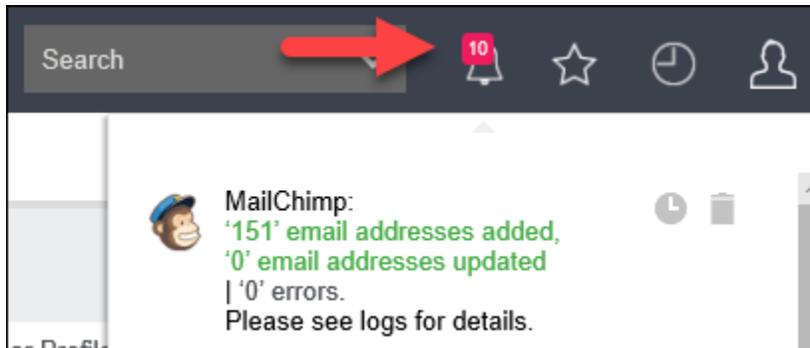
*If you use a **static** group, you can't add new people to the group.

Select **Send to MailChimp**

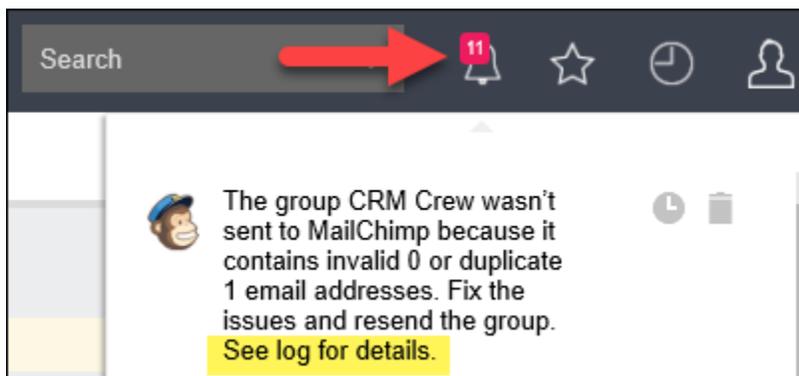
The screenshot shows the Sage CRM Groups interface after the 'Send to MailChimp' action. A yellow banner at the top contains the message: 'The Group has been sent to Mailchimp. You will receive a notification once the operation has been completed.' A red arrow points to this message. Below the banner, the 'Group Details' are shown for a group named 'MailChimp Test Group'. The details include: Name: MailChimp Test Group, Type: Dynamic Group, Entity: Person, Source View: Person Search, Description: (empty), and Available To: All Users.

You will receive a notification once the operation is complete.

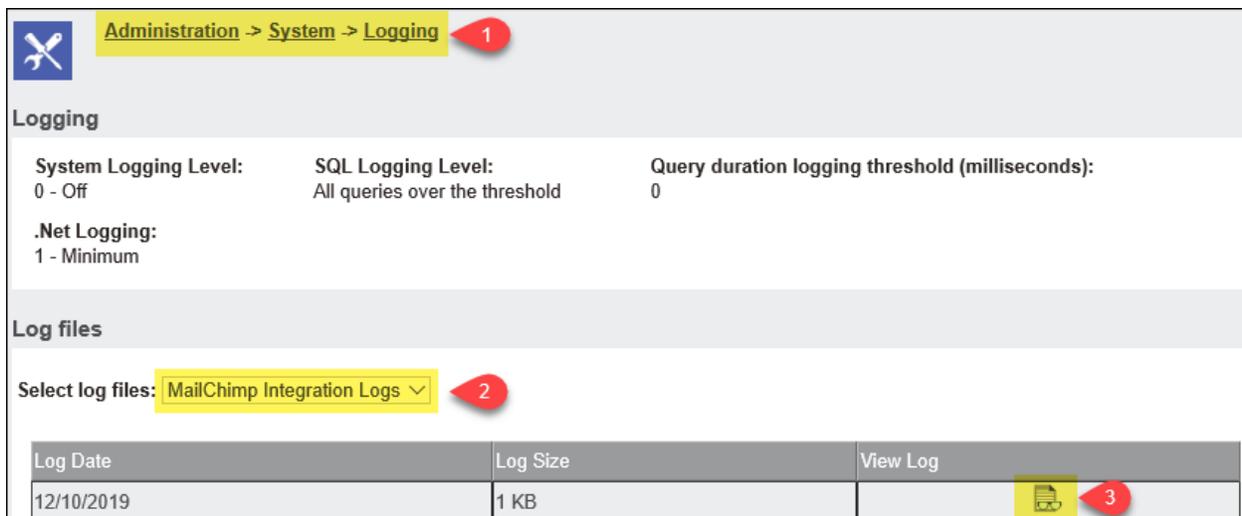
Sample message of successful operation notification:



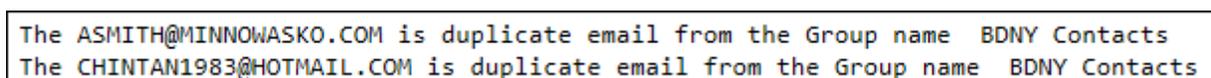
Sample message of failed send:



To diagnose error messages, select the MailChimp Integration Logs:



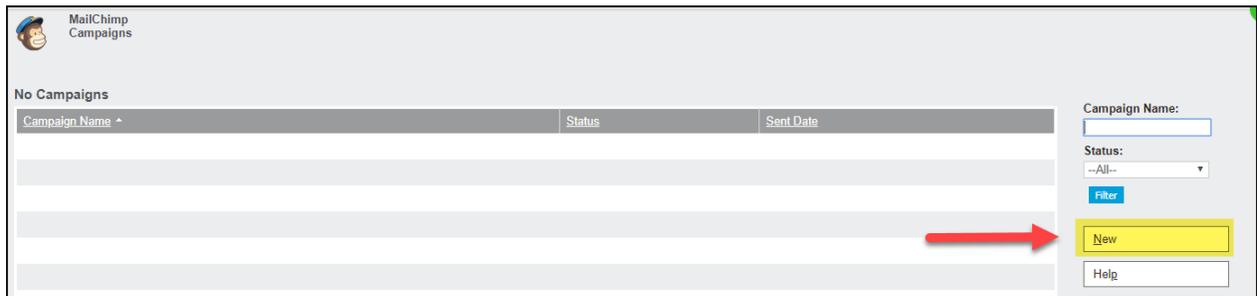
Sample error log info:



Create MailChimp Campaign

Go to **My CRM – MailChimp Campaigns**

Select **New**



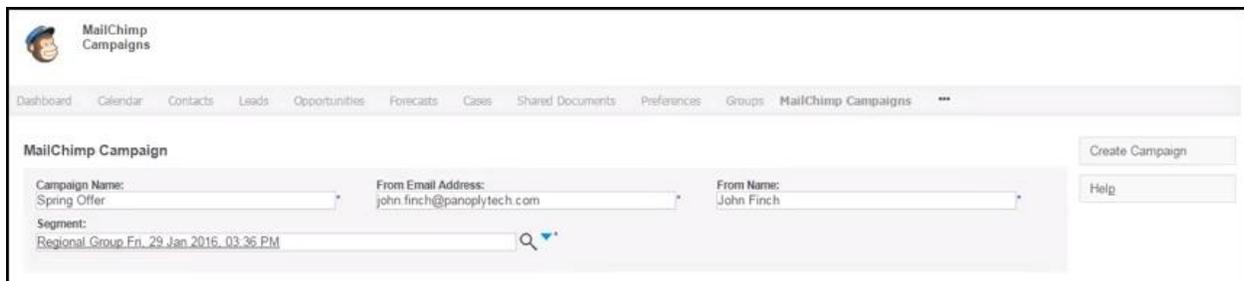
Enter campaign details:

Enter **Campaign Name** – do not use special characters

Enter **From Email Address** = address from which the campaign will email

Enter **From Name** = sender name

Choose **Segment** = group to which emails will be sent



Select **Create Campaign**

MailChimp opens in new browser. (If you don't see this, check your browser pop up blocker.)

1. Choose campaign template
2. Add details
3. Send

View Campaign Results in CRM

Once the campaign has been sent, view the results of the campaign in CRM.

Go to My CRM - MailChimp Campaigns

Dashboard | Calendar | Calendar List | Contacts | Projects | Forecasts | Cases | Shared Documents | Preferences | Groups | **MailChimp Campaigns** | Accelerator

GUMU Dashboard | ID Generation | ...

MailChimp Campaigns +

MailChimp Campaign Details

Campaign Name: CRM Crew Test Run	Group: CRM Crew	Last Updated: 12/05/2019 10:15 AM
From Email Address: jacqueline@spaciagroup.com	From Name: Spacia Group	

MailChimp Campaign Results

Total Opened: 3	Total Clicked: 1	Soft Bounce: 0	Hard Bounce: 0	Unsubscribed: 0
Emails Sent: 3	Unique Opened: 1	Unique Clicked: 1	Last Opened: 12/05/2019 10:11 AM	

View in MailChimp
Refresh
Close Campaign
Continue
Delete
Help

Communication Record

A communication record is created in the recipient's Communication tab.

Summary | Quick Look | **Communications** | Projects | Cases | Addresses | Phone/E-mail | Documents | ...

Person: April Braun | **Phone:** | **E-mail:** april.braun@mycrmmanager.com
Company: My CRM Manager

22 Communications, Page 1 of 1

	Date / Time	Action	Subject	Details	Created By	Created Date	User	About	Status
	12/04/2019 3:04 PM	E-mail Out	CRM Crew Test Run		0	12/04/2019 4:15 PM			
	10/31/2019 10:00 AM	Meeting	CRM Training		Abby Papenfuss	10/23/2019 3:56 PM	Abby Papenfuss		
	10/30/2019 2:10 PM	Shop Drawing	Shop Drawing		System Administrator	10/30/2019 1:40 PM	System Administrator		

E-mail Out

Person: April Braun | **Phone:** | **E-mail:** april.braun@mycrmmanager.com

E-mail Out

Links: April Braun
Sent: 12/04/2019 3:04 PM
From: Spacia Group
To: april.braun@mycrmmanager.com
CC:
BCC:
Subject: CRM Crew Test Run

Links to MailChimp

MailChimp has sent an email to: april.braun@mycrmmanager.com for campaign: CRM Crew Test Run [View Campaign](#)



4. Support

The MailChimp website is a great tool for learning how to create attractive email templates and content. See the MailChimp knowledgebase page for information and videos: <http://kb.mailchimp.com/>

If any assistance is required during the integration set up between MailChimp and Sage CRM, please contact My CRM Manager.