



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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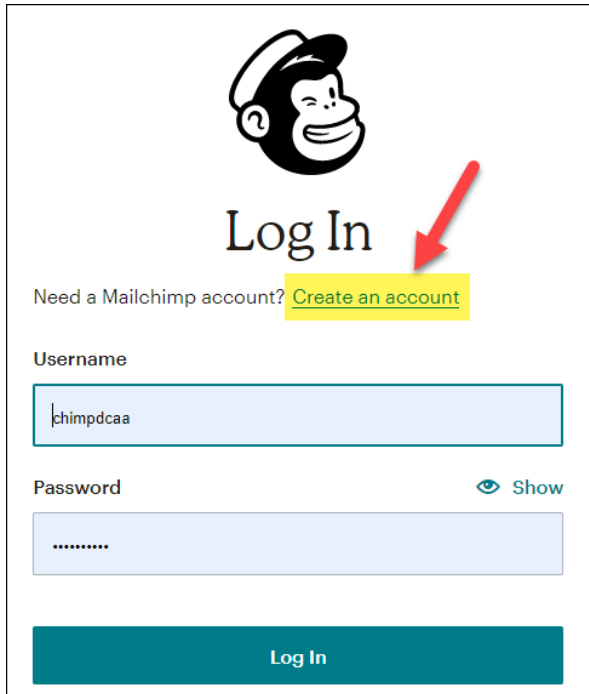
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1. MailChimp Set Up:

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

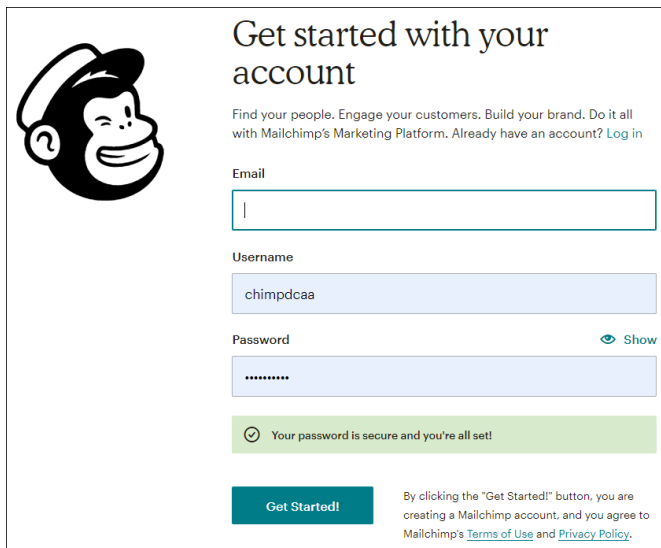
Log In/Create a MailChimp Account

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



The screenshot 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 yellow button labeled "Create an account" which is located next to the text "Need a Mailchimp account?". Below this, there are input fields for "Username" (containing "chimpdcaa") and "Password" (masked with dots). A "Show" link with an eye icon is next to the password field. At the bottom is a large teal button labeled "Log In".

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



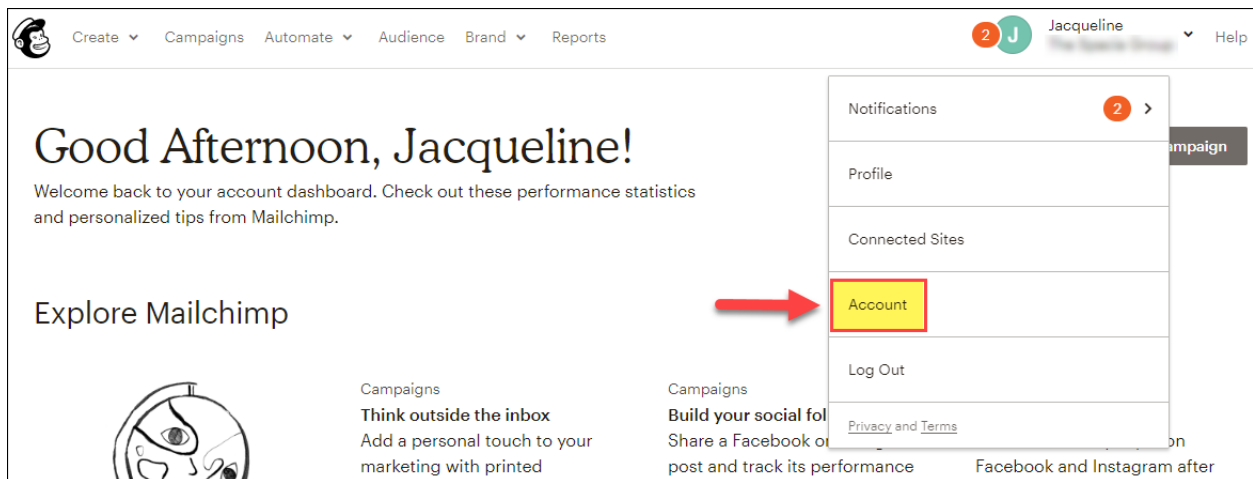
The screenshot shows the MailChimp "Get started with your account" screen. On the left is the MailChimp monkey logo. The main heading is "Get started with your account". Below this is a subheading: "Find your people. Engage your customers. Build your brand. Do it all with Mailchimp's Marketing Platform. Already have an account? Log in". There are input fields for "Email", "Username" (containing "chimpdcaa"), and "Password" (masked with dots). A "Show" link with an eye icon is next to the password field. Below the password field is a green box with a checkmark icon and the text "Your password is secure and you're all set!". At the bottom left is a teal button labeled "Get Started!". To the right of this 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

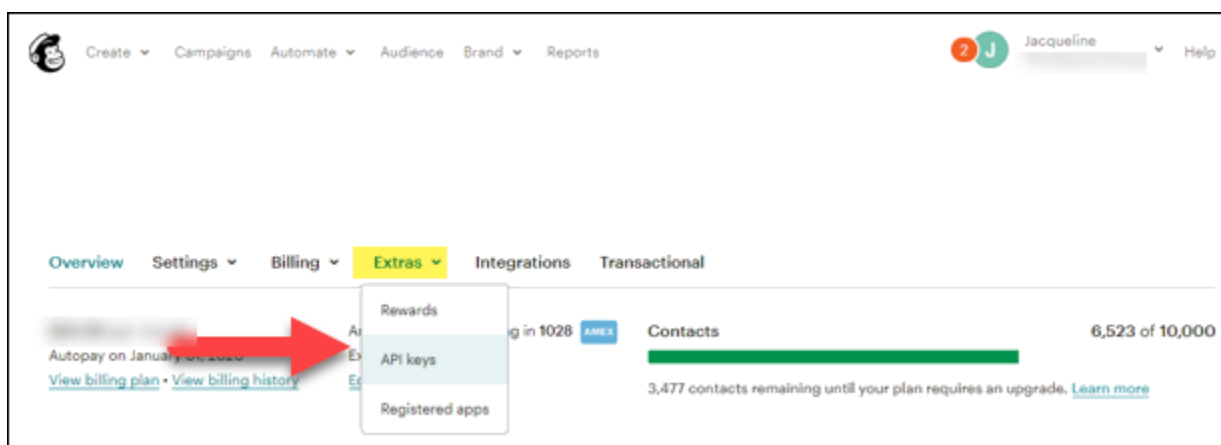
*There are three types of MailChimp pricing plan. On the free plan, you can send 12,000 emails to 2,000 subscribers per month. If you need to send more emails or have more subscribers, you can upgrade to a paid plan. For more information, see mailchimp.com/pricing/.

Create an API key

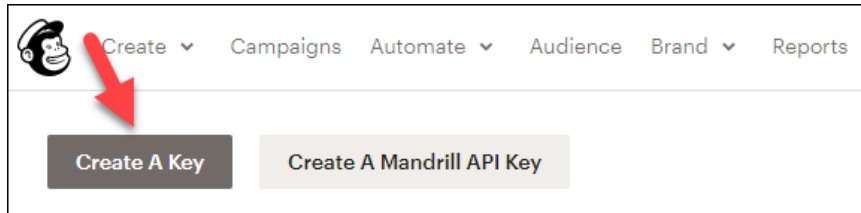
From the profile name, select **Account**:



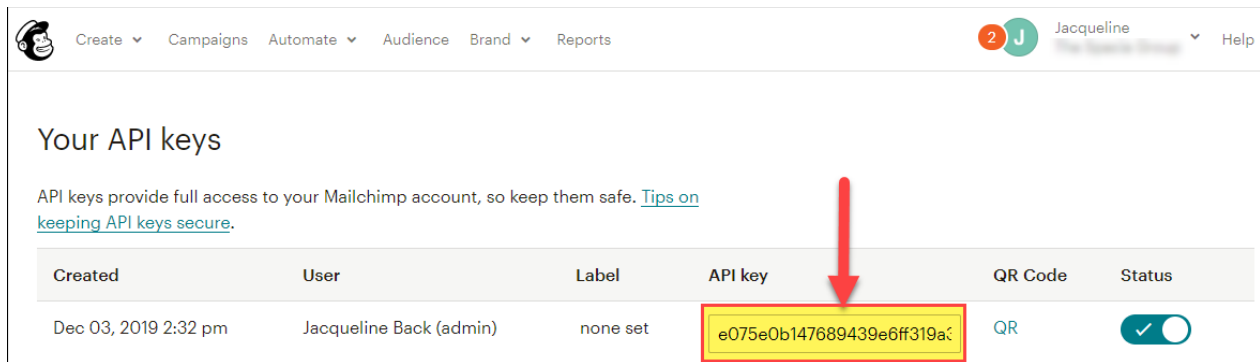
From **Extras** tab, select **API keys**:



Choose **Create A Key**:

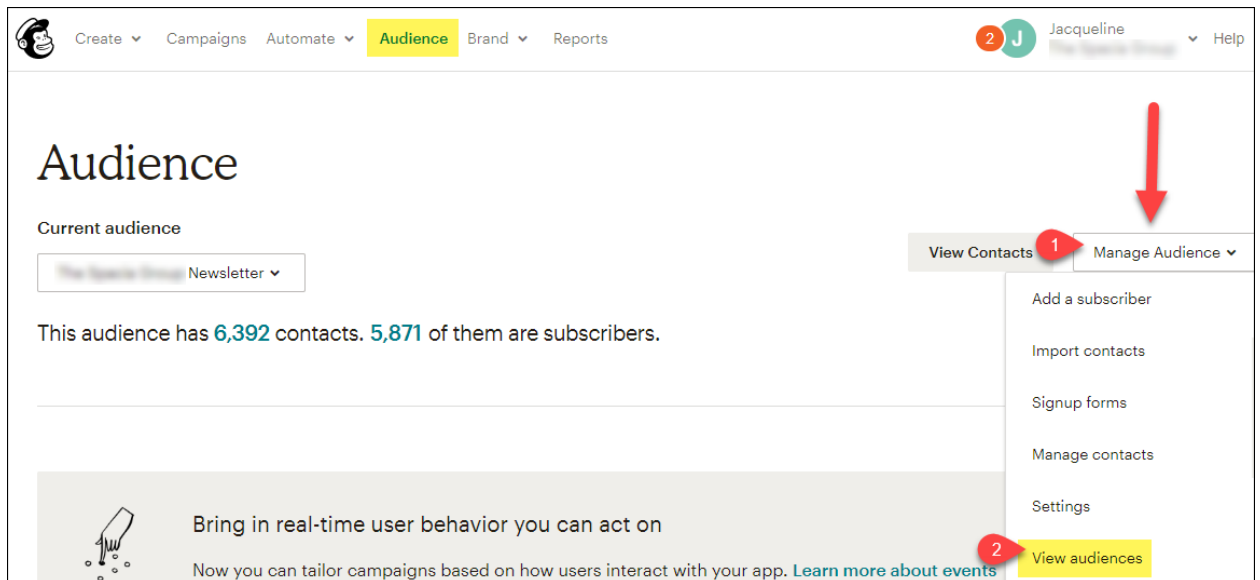


Copy API key (paste to Notepad)

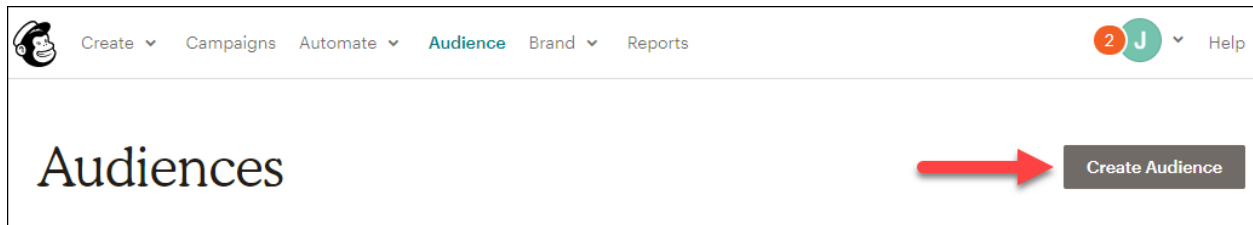


Create an Audience ID


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



Select Create Audience



Add audience details:


Create
Campaigns
Automate
Audience
Brand
Reports

2
J
Help

Audiences

Create Audience

Audience details

Audience name

Default From email address

Default From name

Campaign URL settings


(generate)

Choose a verified domain to use in your campaign URLs. You must be authorized to use the domain name you choose.

Remind people how they signed up to your audience

Write a short reminder about how the recipient joined your audience.

Contact information for this audience - Why is this necessary?



[Edit](#)

Form Settings

☐ **Enable double opt-in**
Send contacts an opt-in confirmation email when they subscribe to your audience.

☐ **Enable GDPR fields**
Customize your forms to include GDPR fields.

Select Notifications setting(s) and Save.

Notifications
Sent to jacqueline@.com

[Edit](#)

☐ **Daily summary**
Summary of subscribe/unsubscribe activity

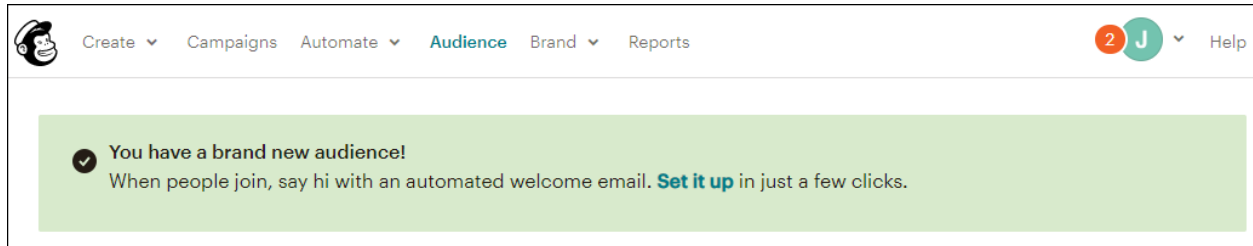
☐ **One-by-one**
Subscribe notifications as they happen

☐ **One-by-one**
Unsubscribe notifications as they happen

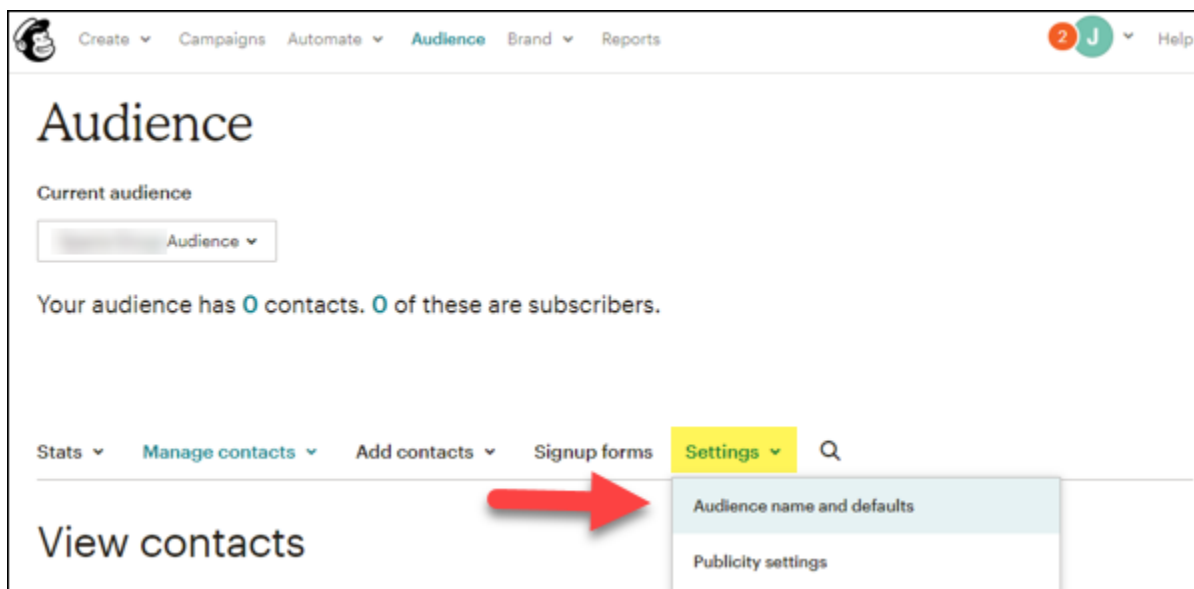
Save

[Cancel](#)

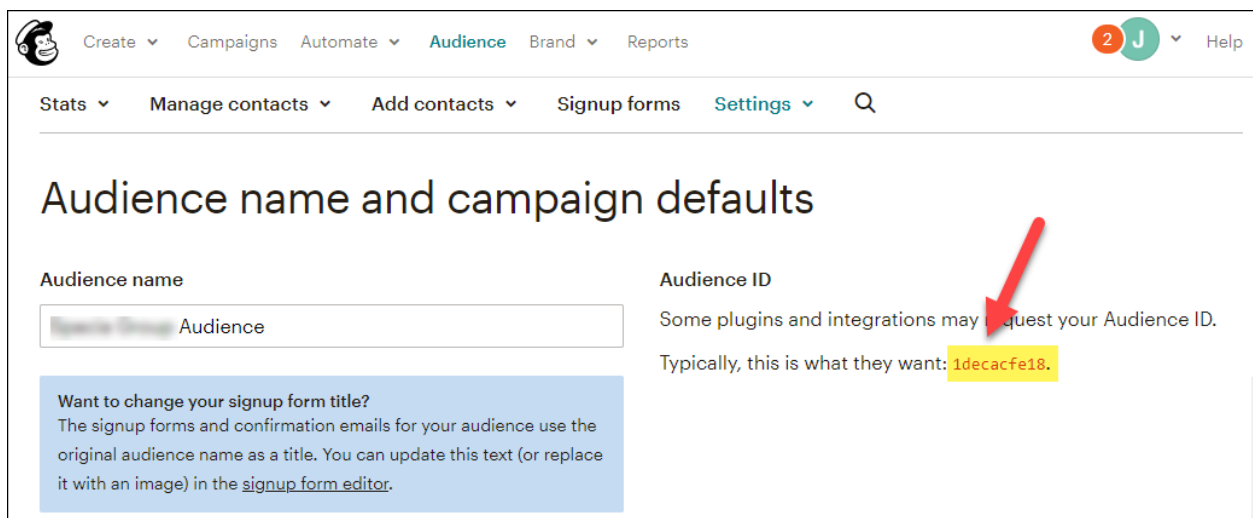
New audience is confirmed:



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



Copy Audience ID





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
<div>Email Address</div> <div>email</div>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	* EMAIL * or * MERGE0 *	
<div>Address</div> <div>address</div>	<input type="checkbox"/>	<input type="checkbox"/>	* ADDRESS * or * MERGE3 *	
<div>Phone Number</div> <div>phone</div>	<input type="checkbox"/>	<input type="checkbox"/>	* PHONE * or * MERGE4 *	<div>Default merge tag value</div> 

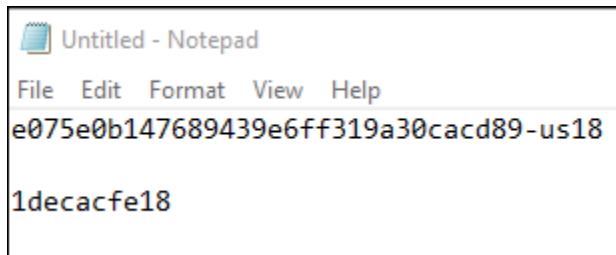
Are you sure? ×

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

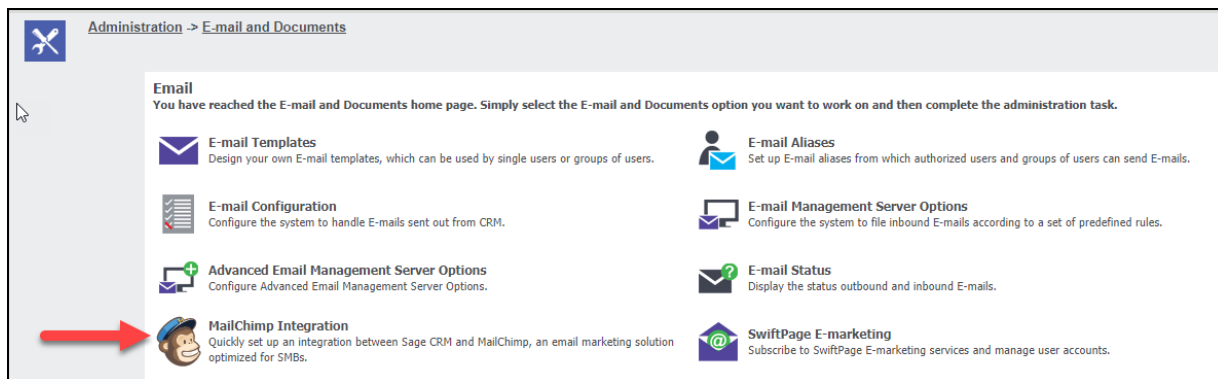
Delete
Cancel

Paste to Notepad:



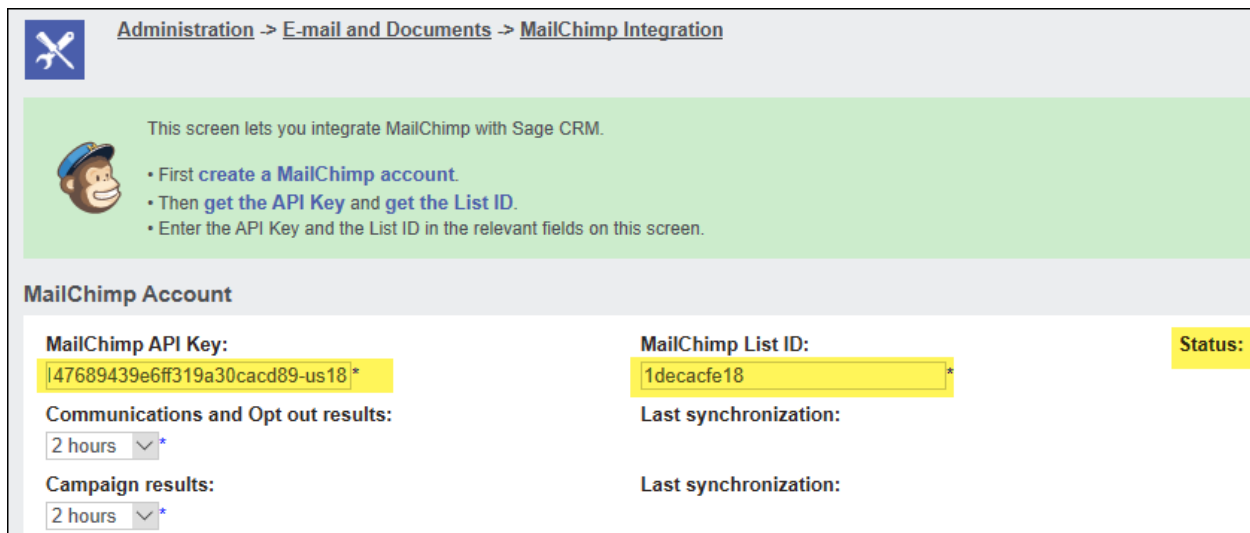
2. CRM Set Up:

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.

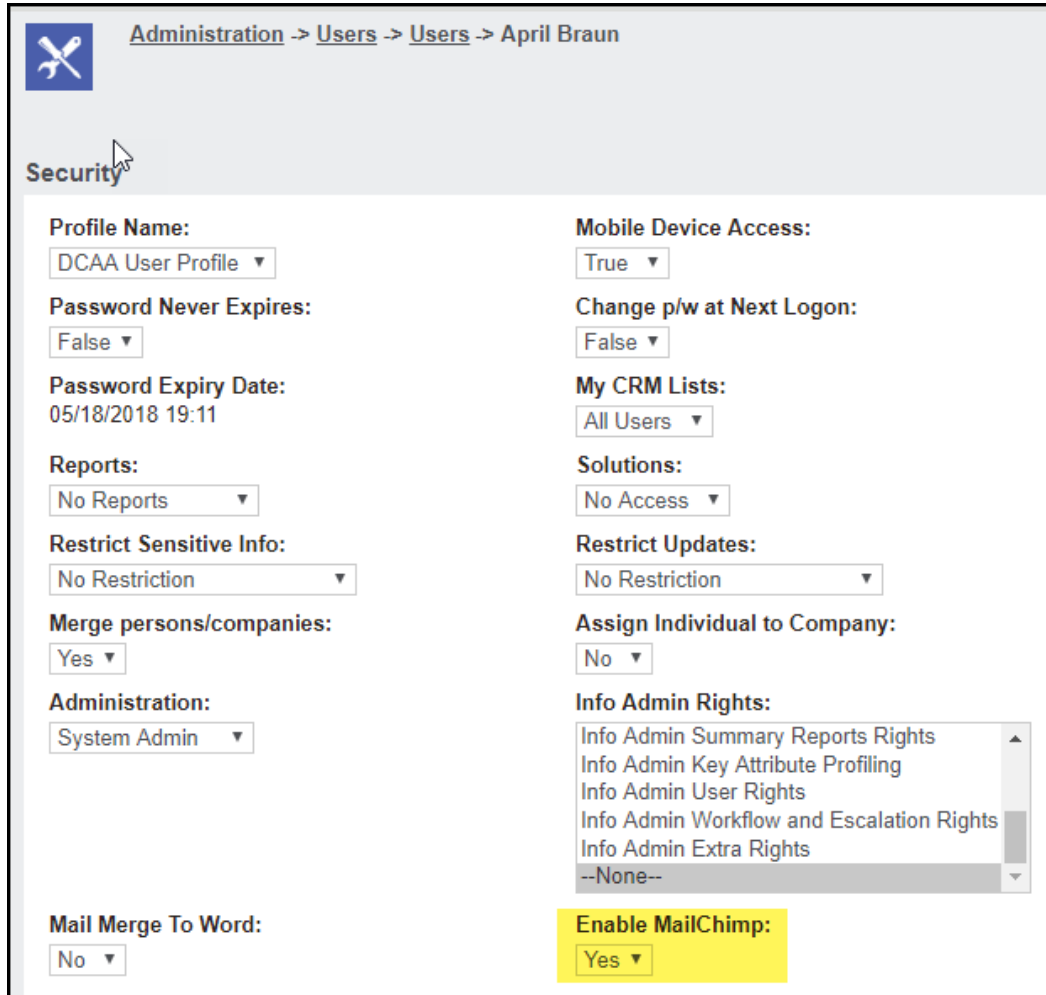
MailChimp Account

MailChimp API Key: e075e0b147689439e6ff319a30cacd89-us18	MailChimp List ID: 1decacfe18	Status: Enabled
Communications and Opt out results: 2 hours	Last synchronization:	
Campaign results: 2 hours	Last synchronization:	

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 ▼

Password Never Expires:
False ▼

Password Expiry Date:
05/18/2018 19:11

Reports:
No Reports ▼

Restrict Sensitive Info:
No Restriction ▼

Merge persons/companies:
Yes ▼

Administration:
System Admin ▼

Mobile Device Access:
True ▼

Change p/w at Next Logon:
False ▼

My CRM Lists:
All Users ▼

Solutions:
No Access ▼

Restrict Updates:
No Restriction ▼

Assign Individual to Company:
No ▼

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).

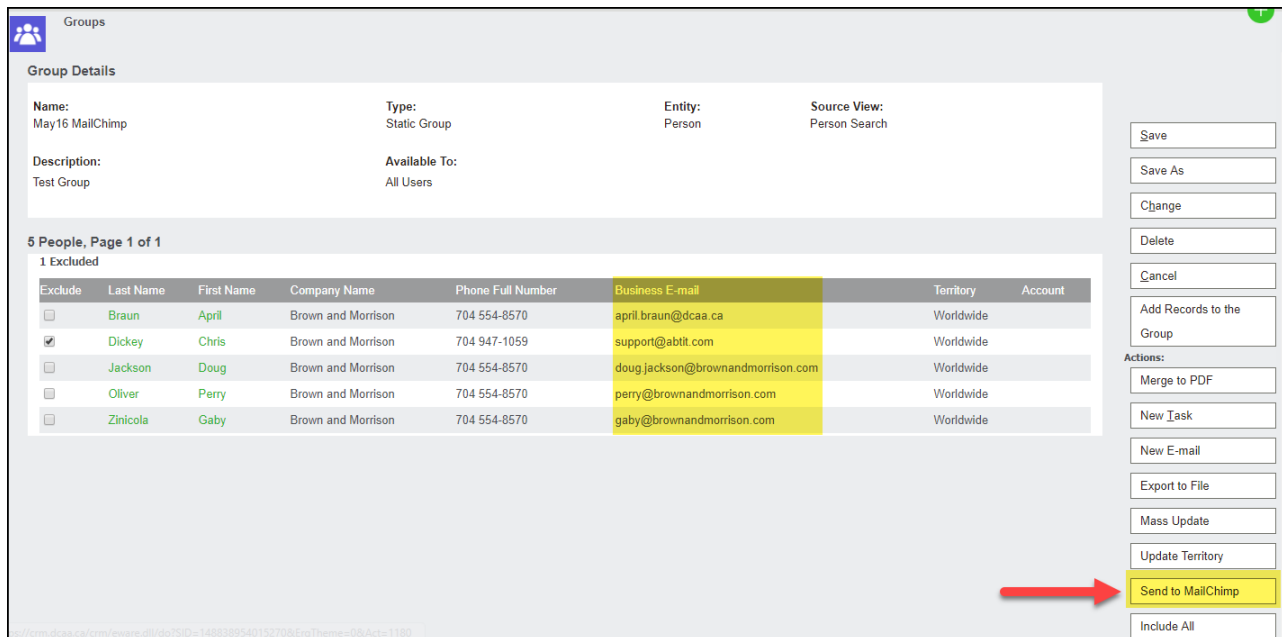
3. Working with MailChimp and Sage CRM

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



Groups

Group Details

Name: May16 MailChimp	Type: Static Group	Entity: Person	Source View: Person Search
Description: Test Group	Available To: All Users		

5 People, Page 1 of 1

1 Excluded

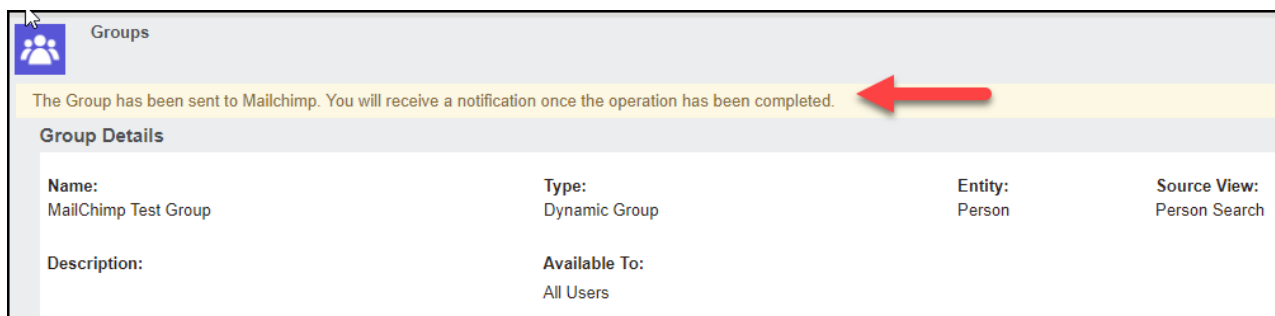
Exclude	Last Name	First Name	Company Name	Phone Full Number	Business E-mail	Territory	Account
<input type="checkbox"/>	Braun	April	Brown and Morrison	704 554-8570	april.braun@dcaa.ca	Worldwide	
<input checked="" type="checkbox"/>	Dickey	Chris	Brown and Morrison	704 947-1059	support@abtlit.com	Worldwide	
<input type="checkbox"/>	Jackson	Doug	Brown and Morrison	704 554-8570	doug.jackson@brownandmorrison.com	Worldwide	
<input type="checkbox"/>	Oliver	Perry	Brown and Morrison	704 554-8570	perry@brownandmorrison.com	Worldwide	
<input type="checkbox"/>	Zinicola	Gaby	Brown and Morrison	704 554-8570	gaby@brownandmorrison.com	Worldwide	

Actions:

- 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**
- Include All

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

Select **Send to MailChimp**



Groups

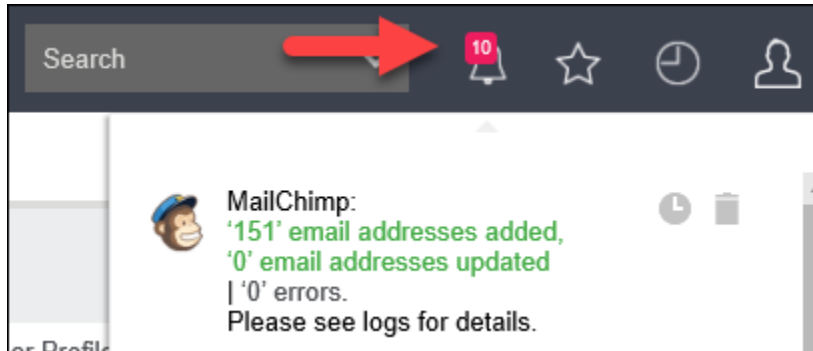
The Group has been sent to Mailchimp. You will receive a notification once the operation has been completed.

Group Details

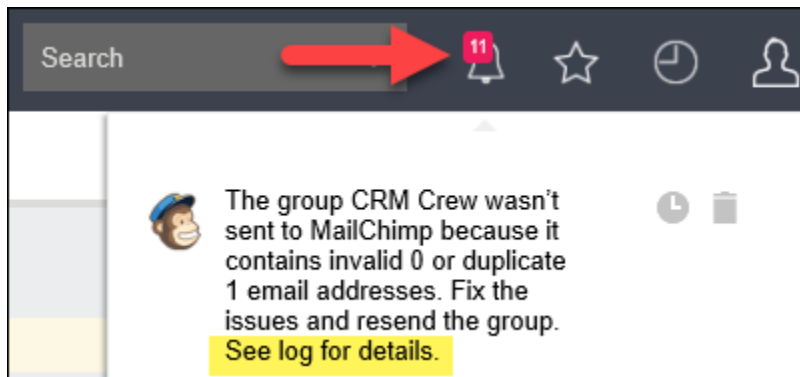
Name: MailChimp Test Group	Type: Dynamic Group	Entity: Person	Source View: Person Search
Description:	Available To: All Users		

You will receive a notification once the operation is complete.

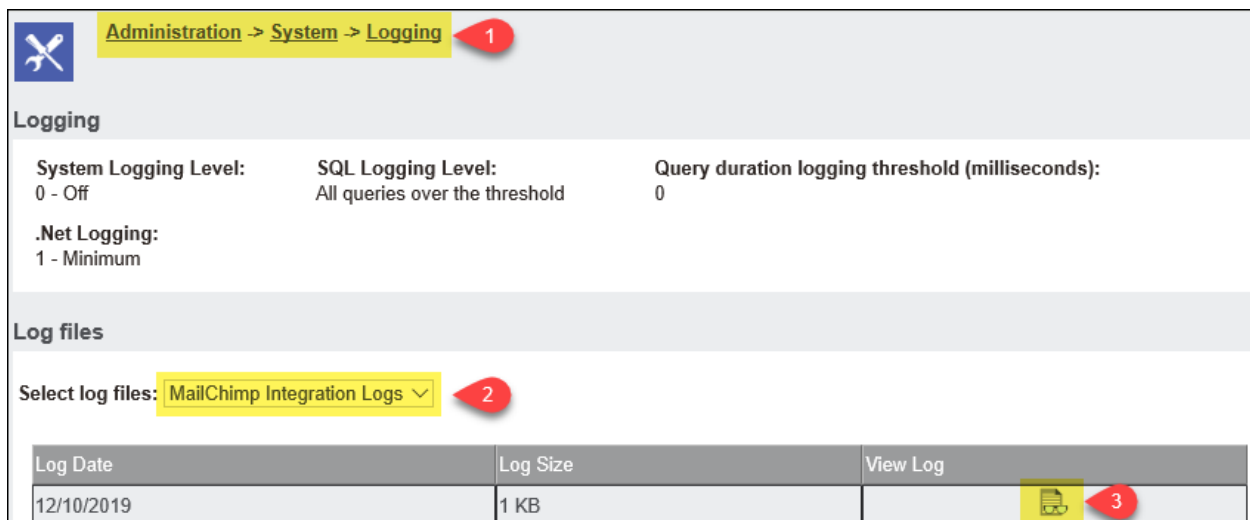
Sample message of successful operation notification:



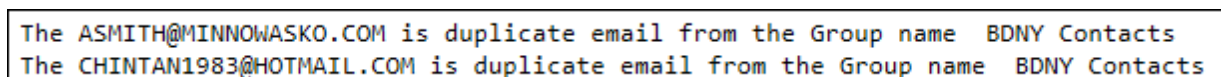
Sample message of failed send:



To diagnose error messages, select the MailChimp Integration Logs:



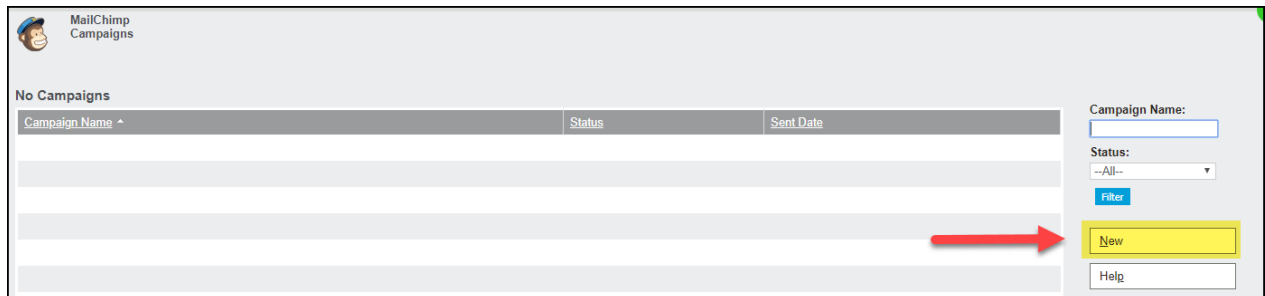
Sample error log info:



Create MailChimp Campaign

Go to **My CRM – MailChimp Campaigns**

Select **New**



MailChimp Campaigns

No Campaigns

Campaign Name	Status	Sent Date

Campaign Name:

Status:

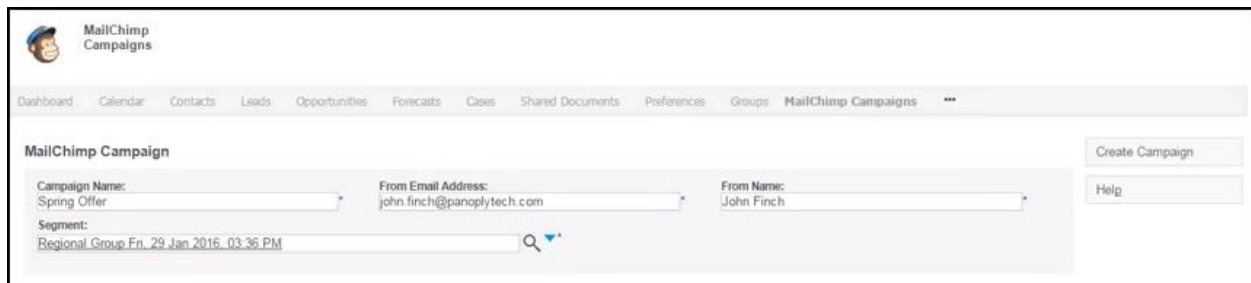
Enter campaign details:

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



MailChimp Campaigns

Dashboard Calendar Contacts Leads Opportunities Forecasts Cases Shared Documents Preferences Groups MailChimp Campaigns ***

MailChimp Campaign

Campaign Name:

From Email Address:

From Name:

Segment:

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
From Email Address: jacqueline@spaciagroup.com

Group: CRM Crew
From Name: Spacia Group
Last Updated: 12/05/2019 10:15 AM

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
Company: My CRM Manager
Phone:
E-mail: april.braun@mycrmmanager.com

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:
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.