

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.

Contents

1. MailChimp Set Up	2
Create a MailChimp Account	2
MailChimp Pricing.....	2
Create an API key.....	3
Create a List ID.....	4
2. CRM Set Up	6
Add API Key and List ID.....	7
Enable MailChimp in the User Profile.....	8
3. Working with MailChimp and Sage CRM	9
Create Sage CRM Group	9
Create MailChimp Campaign	10
View Campaign Results in CRM	11
Communication Record	11
4. Support	11

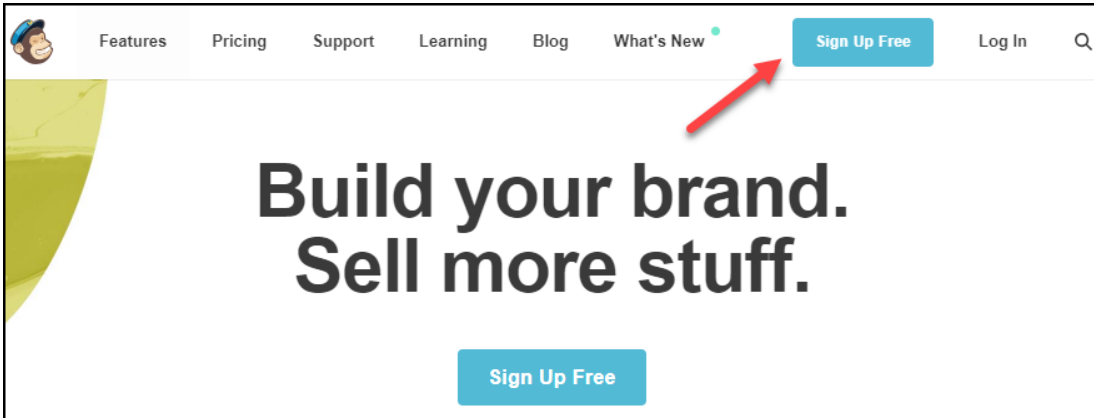
1. MailChimp Set Up:

To get started, please watch this video: <https://www.youtube.com/watch?v=wMdseNzLiRM>

Create a MailChimp Account

If an account has not already been set up, please create an account as follows:

Select **Sign Up Free**



Provide email/user/password and select **Create My Account**

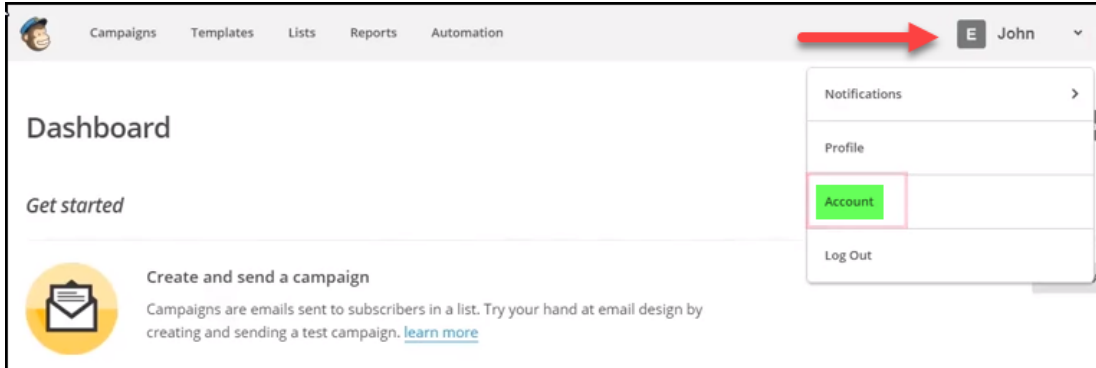
A screenshot of the MailChimp account creation form. The form is titled 'Get started with a free account' and includes a MailChimp logo. The form fields are: Email (janedoe@panopoly.com), Username (janedoe), and Password (masked with dots). A 'Show' button is next to the password field. Below the password field, there is a green box with a checkmark and the text 'Your password is secure and you're all set!'. At the bottom, there is a 'Get Started!' button and a link to 'Anti-spam Policy & Terms of Use'.

MailChimp Pricing

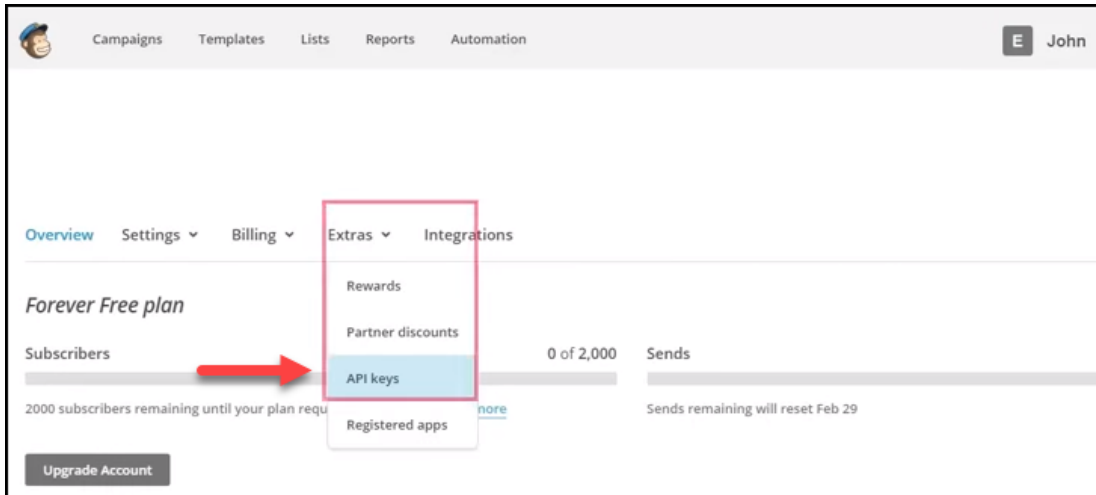
*There are three types of MailChimp pricing plan. On the free plan, you can send 12,000 emails to 2,000 subscribers per month. If you need to send more emails or have more subscribers, you can upgrade to a paid plan. For more information, see mailchimp.com/pricing/.

Create an API key

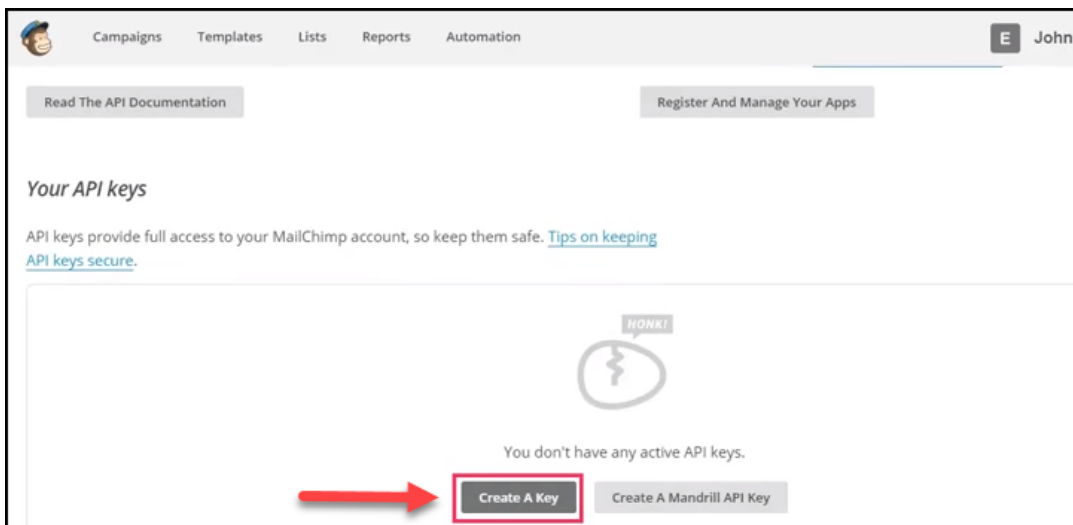
From the profile name, select **Account**:



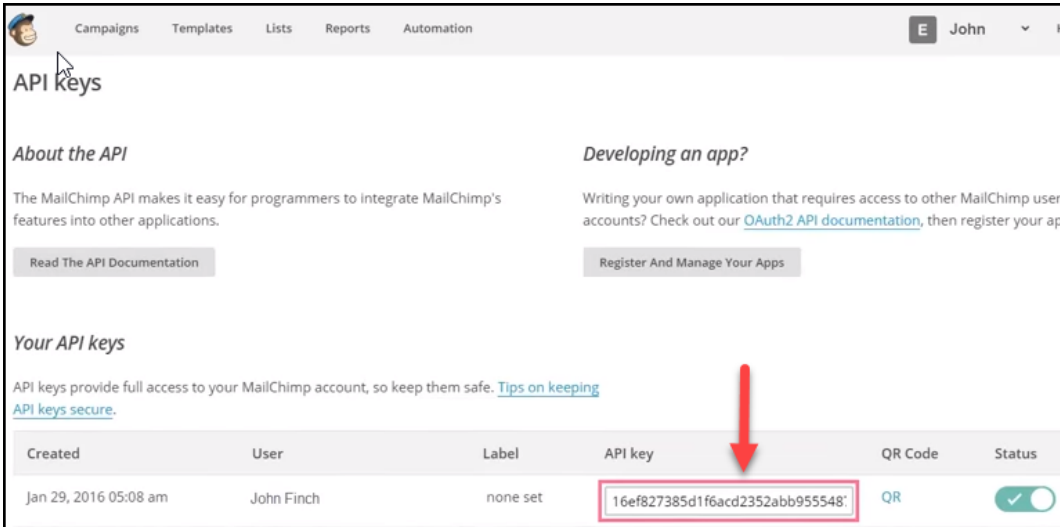
From **Extras** tab, select **API keys**:



Choose **Create A Key**:

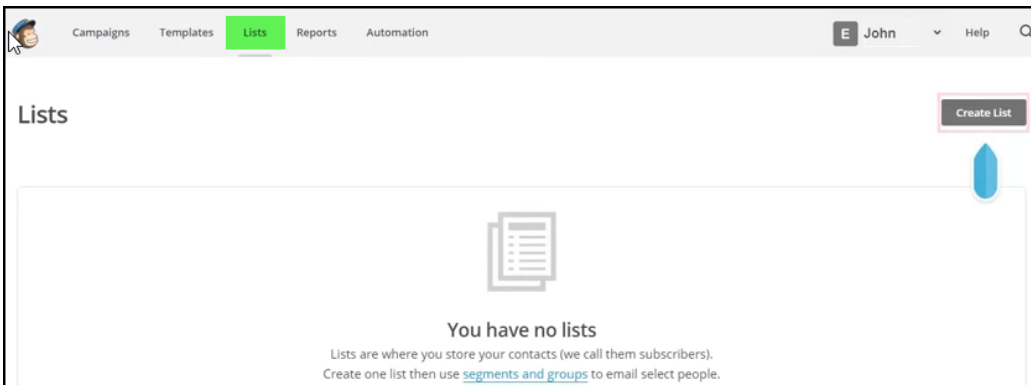


Copy API key (paste to Notepad)

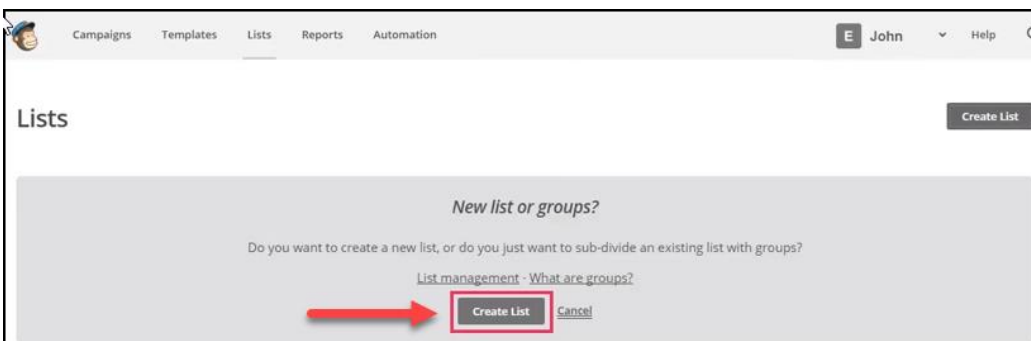


Create a List ID

From **Lists** tab, select **Create List**:



Select **Create List**



Add list details:

Campaigns Templates Lists Reports Automation

Create List

SAMPLE

List details

List name
Favorite List

Default "from" email
info@panoplytech.com

Default "from" name
PanoplyTech

Remind people how they signed up to your list
You are receiving this email because you opted in on our website.

Scroll down and **Save**.

Campaigns Templates Lists Reports Automation

Notifications Sent to emmacassidylee@gmail.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

Choose **Stats – Settings**:

Campaigns Templates Lists Reports Automation E John Help

Lists

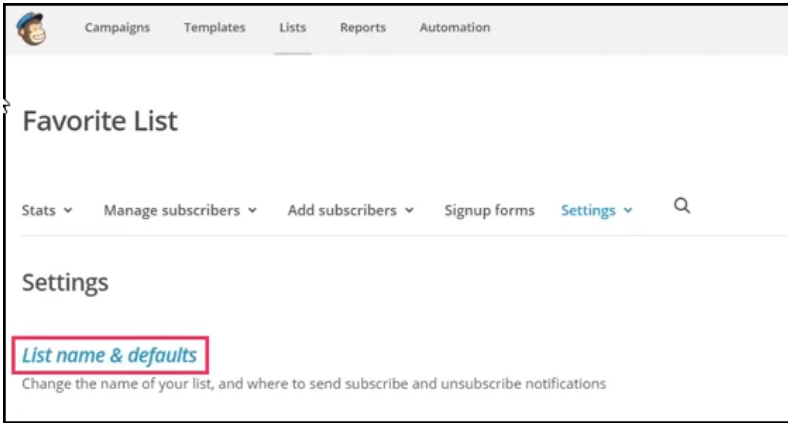
Create List

Sort By Custom order

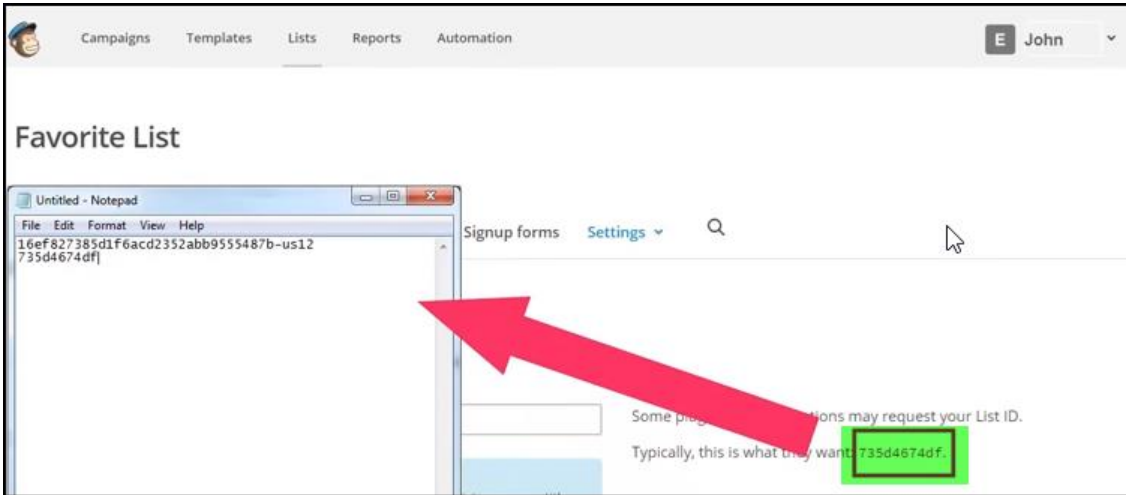
	0	0.0%	0.0%
	Subscribers	Opens	Clicks
<input type="checkbox"/> Favorite List Created Jan 29, 2016 05:14 am No rating yet			

Manage subscribers
Signup forms
Settings
Import

Choose **List name & defaults**:

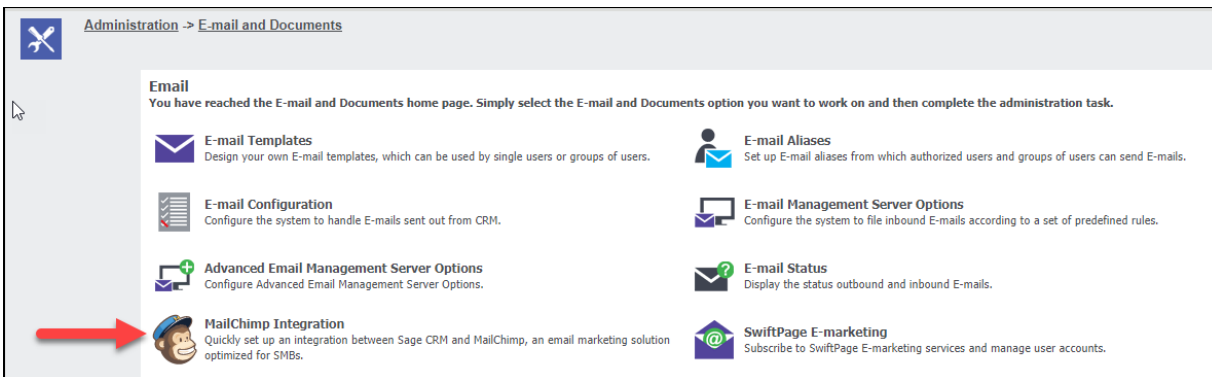


Copy List ID (paste to Notepad)




2. CRM Set Up:

Go to **Administration – Email and Documents**




Add API Key and List ID

Copy and Paste API Key and List ID from Notepad

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

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: 51498e1f28c82837ea34a1224e40c299-u*	MailChimp List ID: ac2750c705*
Communications and Opt out results: 2 hours ▼*	Last synchronization:
Campaign results: 2 hours ▼*	Last synchronization:

Save.

 [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: 51498e1f28c82837ea34a1224e40c299-us11	MailChimp List ID: ac2750c705	Status: Enabled
Communications and Opt out results: 2 hours	Last synchronization:	
Campaign results: 2 hours	Last synchronization:	

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.

3. Working with MailChimp and Sage CRM

To review the details of groups and campaigns, please watch this video:
<https://www.youtube.com/watch?v=bQcxO4HwyRA>

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

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@abtl.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.

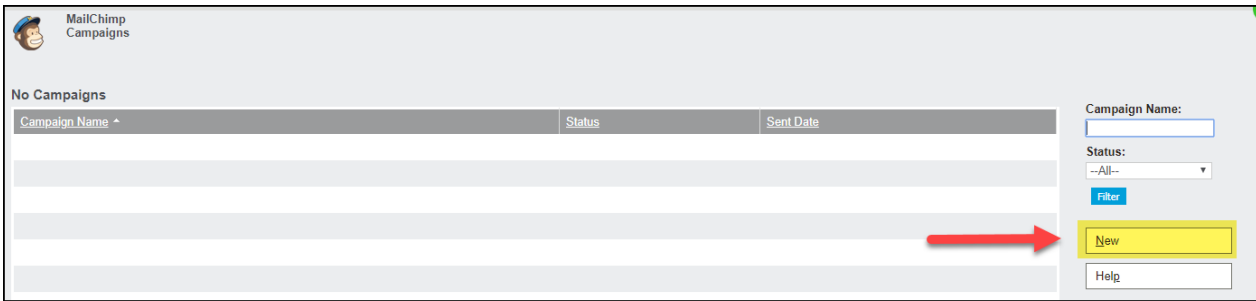
Group Details

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

Create MailChimp Campaign

Go to **My CRM – MailChimp Campaigns**

Select **New**



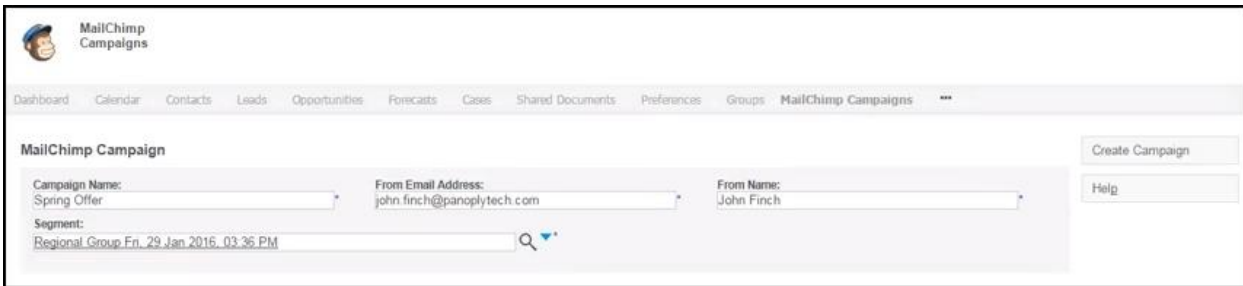
Enter campaign details:

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 - choose campaign template, add details and 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**

The screenshot shows the Sage CRM interface for MailChimp Campaigns. The top navigation bar includes 'My CRM', 'Team CRM', 'Reports', and 'Marketing'. The main content area is titled 'MailChimp Campaigns' and features a navigation menu with 'Dashboard', 'Calendar', 'Contacts', 'Leads', 'Opportunities', 'Forecasts', 'Cases', 'Shared Documents', 'Preferences', 'Groups', and 'MailChimp Campaigns'. Below this, the 'MailChimp Campaign Details' section displays the following information:

Campaign Name: Spring Offer	Group: Regional Group
From Email Address: john.finch@panopolytech.com	From Name: John Finch
	Last Updated:

A red arrow points to the 'MailChimp Campaign Results' section, which is highlighted in green. This section displays the following statistics:

Total Opened: 60	Total Clicked: 88	Bounced: 0	Unsubscribed: 0
Emails Sent: 100	Unique Opened: 75	Unique Clicked: 60	Last Opened:

Communication Record

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

The screenshot shows a communication record for Dan Cousins. The contact information includes: Person: Dan Cousins, Phone: 416.233.3188, and E-mail: dan.cousins@dcaa.ca. The 'E-mail Out' section shows the following details:

Links:	Dan Cousins
Sent:	06/25/2018 2:46 PM
From:	Jane Doe
To:	dan.cousins@dcaa.ca
CC:	
BCC:	
Subject:	June 25 Test

A red arrow points to a green box labeled 'Links to MailChimp' which highlights the text: 'MailChimp has sent an email to: dan.cousins@dcaa.ca for campaign: June 25 Test [View Campaign](#)'. On the right side, there are buttons for 'Change', 'Reply', 'Reply All', and 'Forward'.

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 DCAA.