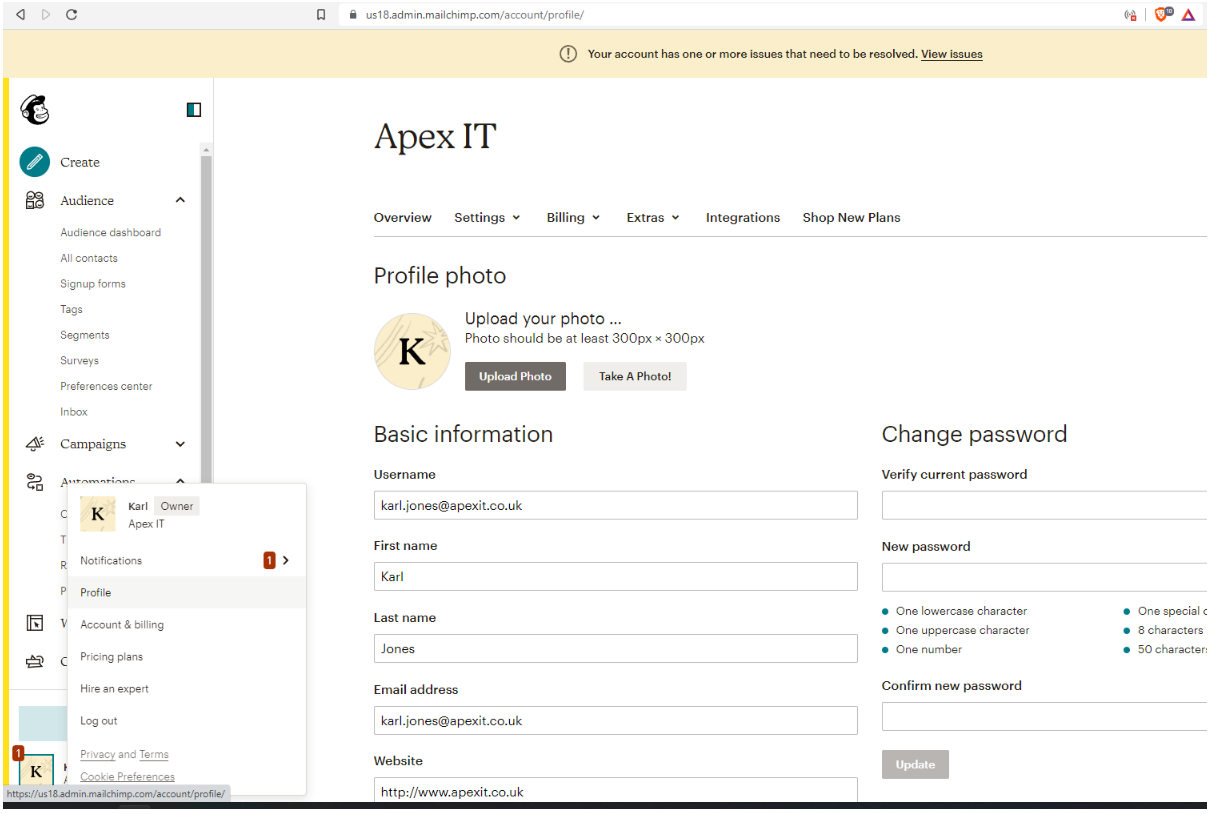
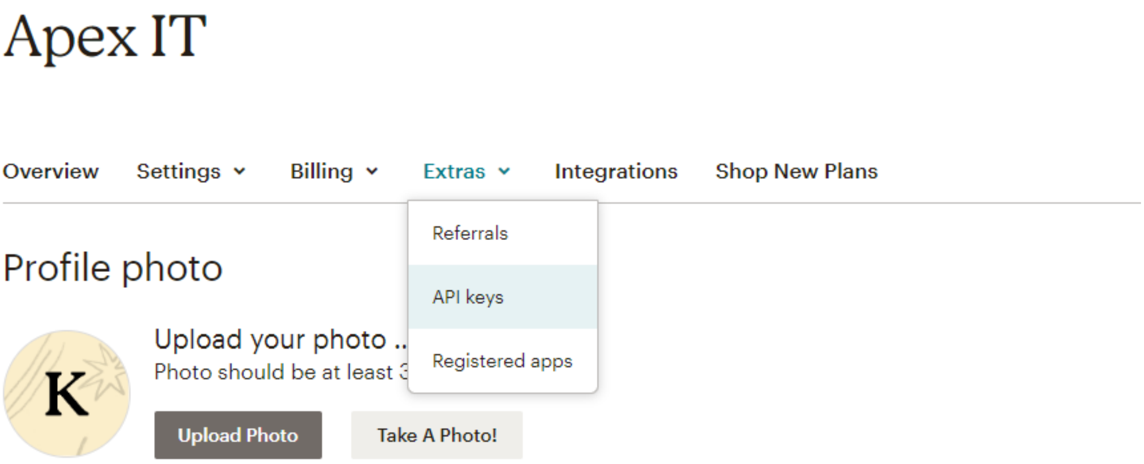
interprise suite™

Mailchimp Integration

Getting an API KEY



Click your account icon bottom left of the screen, that pulls up the menu and then click profile



Click on extras and then API Keys

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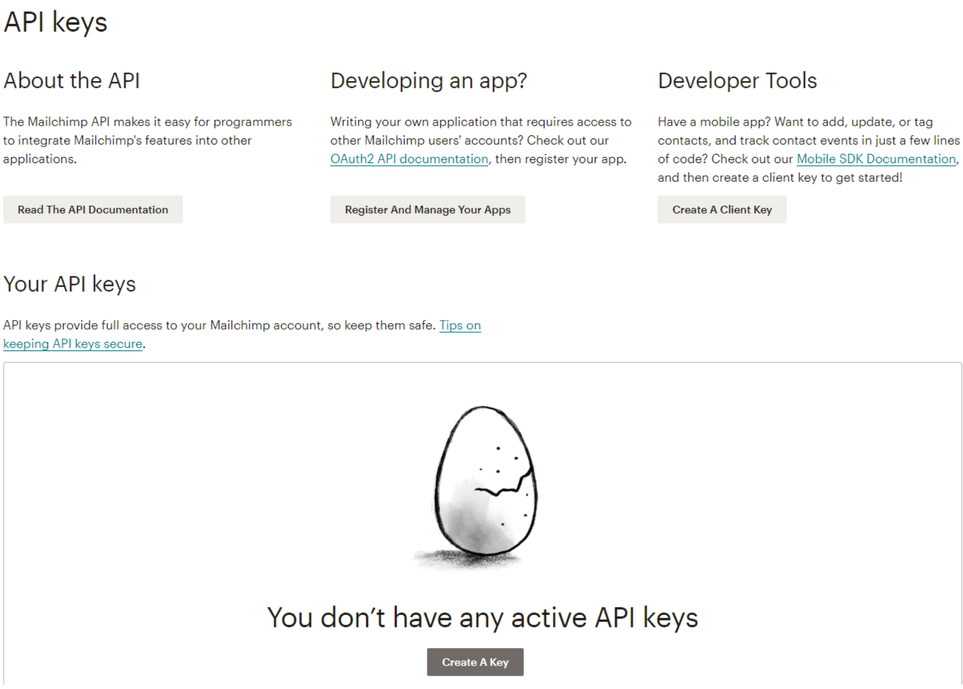
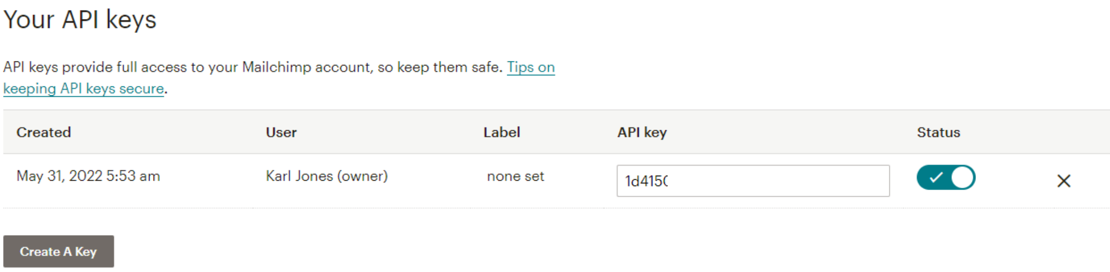
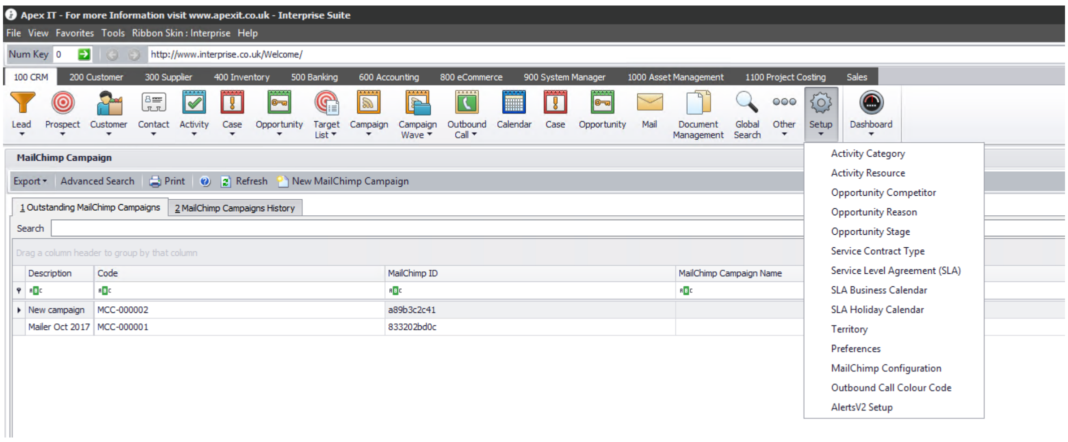


Click create a Key



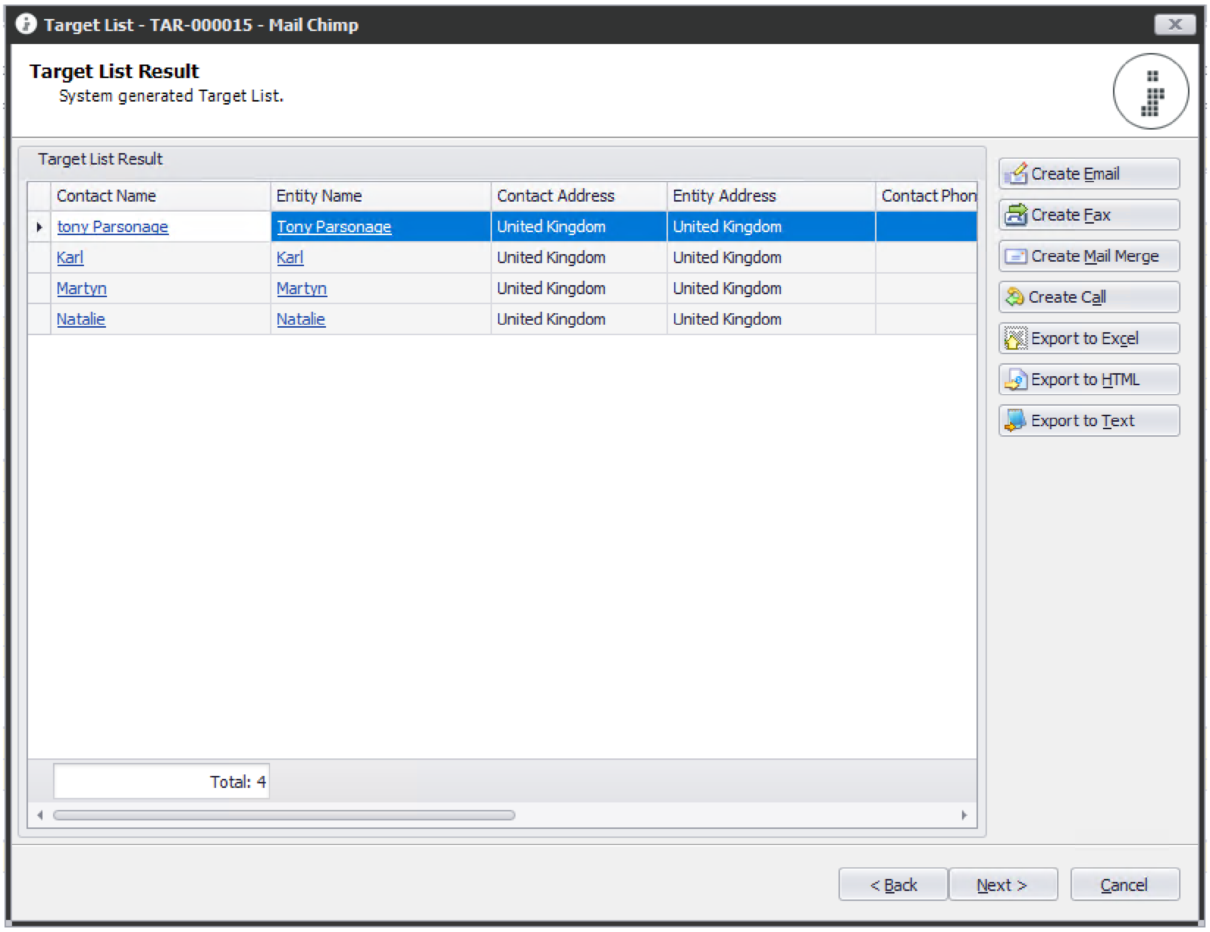
Your key will appear in the box



Go into Interprise and click the Mailchimp Configuration option in the setup drop down and enter the key and click ok. **<u>At this point close (not just log out) Interprise and reopen it.</u>**

Generate a target list

There are other knowledge base articles dedicated to this which are worth reading. You need to create your target list in CRM → target list. I have just shown the screen shot below to show where the Export to Excel button is



You will need to open the file in excel and save it as CSV

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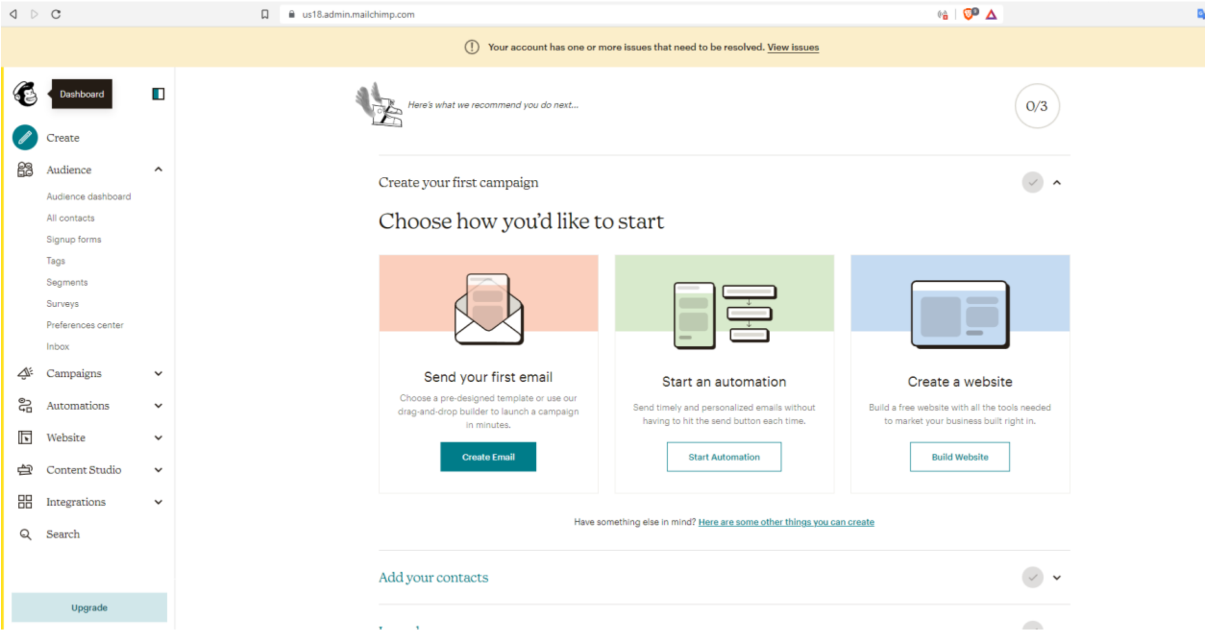
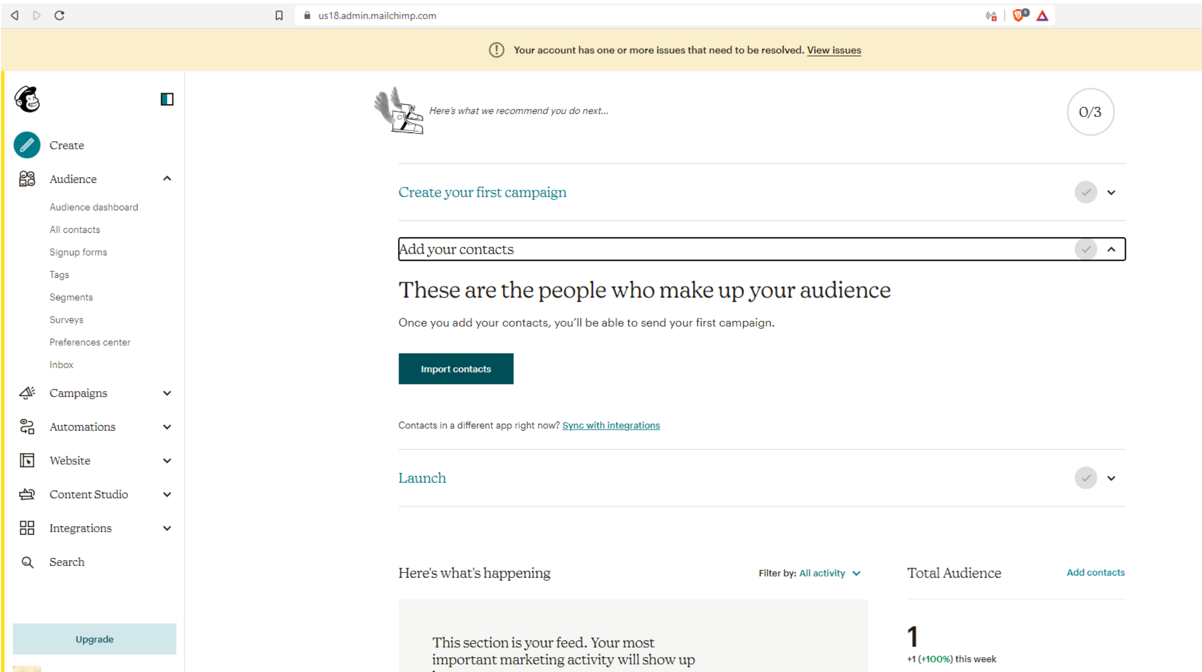
Return to mail chimp and follow the screen shots



Click on Add your contacts



Click on import Contacts

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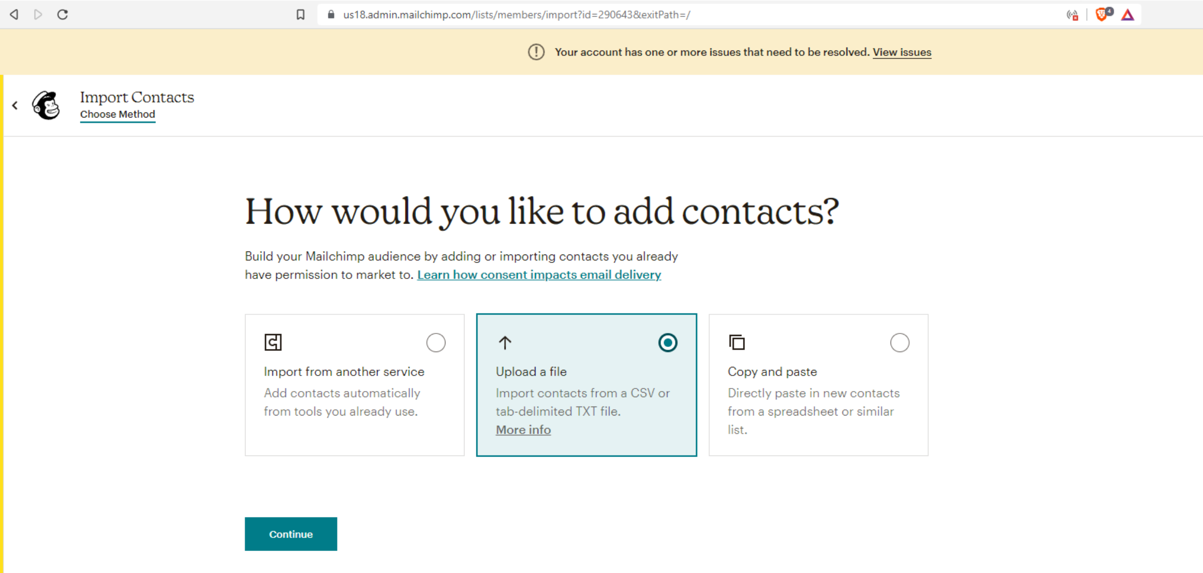
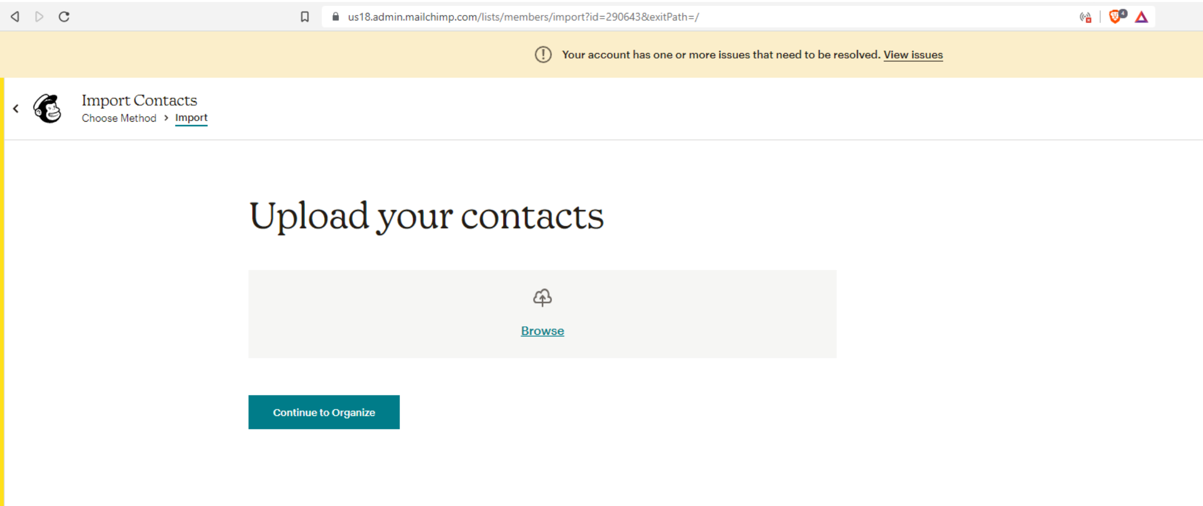
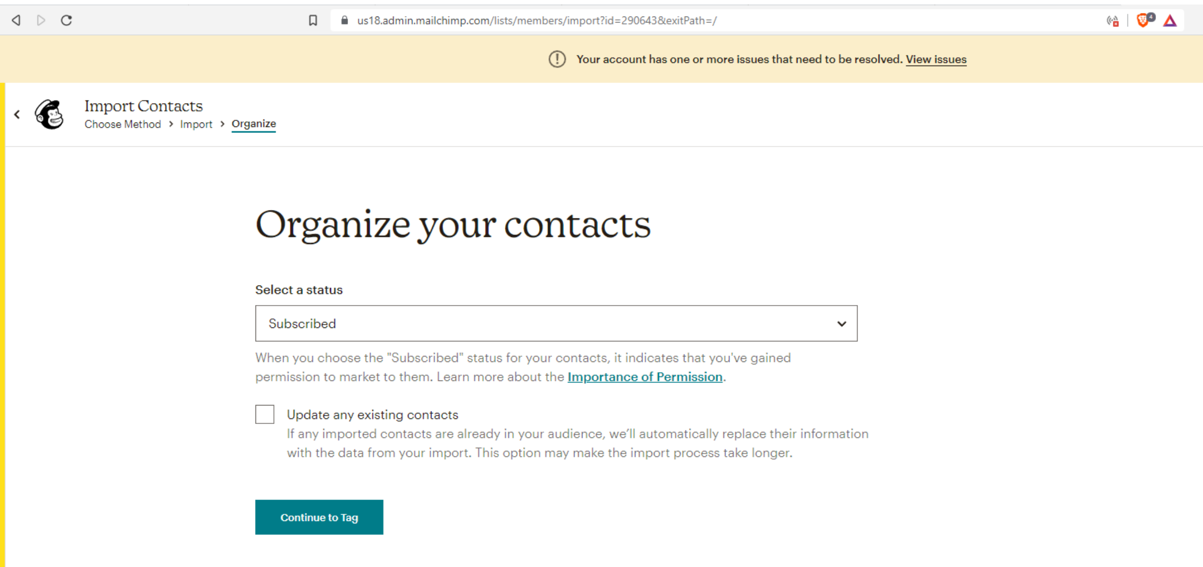


Click on Upload file



Browse to your CSV file and upload it. Mail chimp will ask you to categorise it



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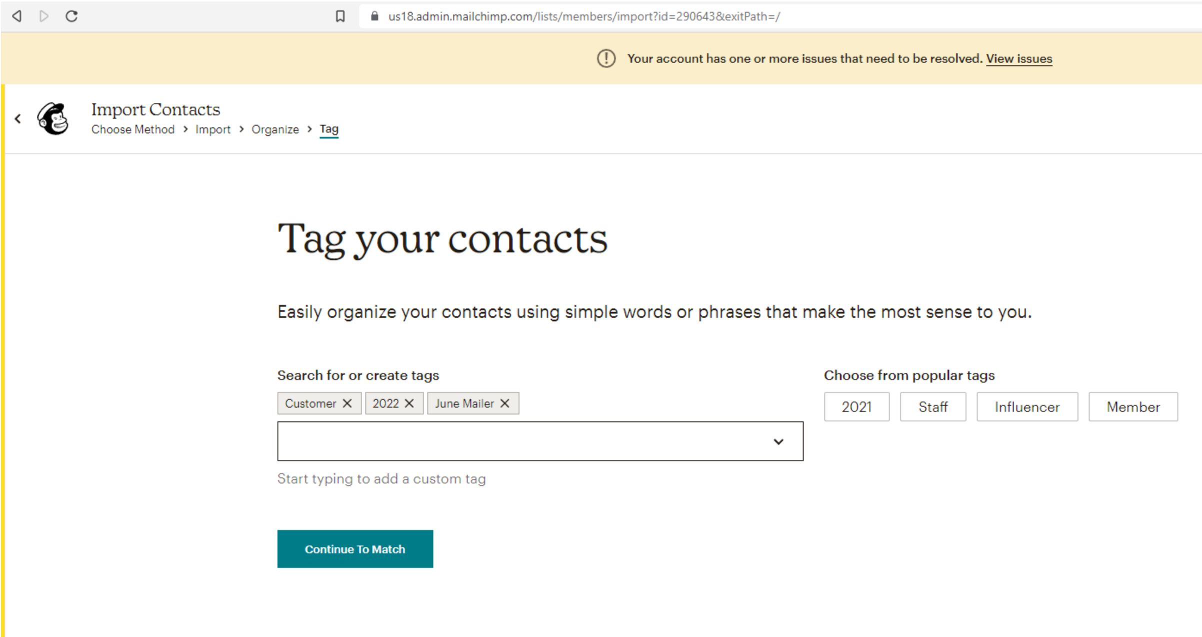
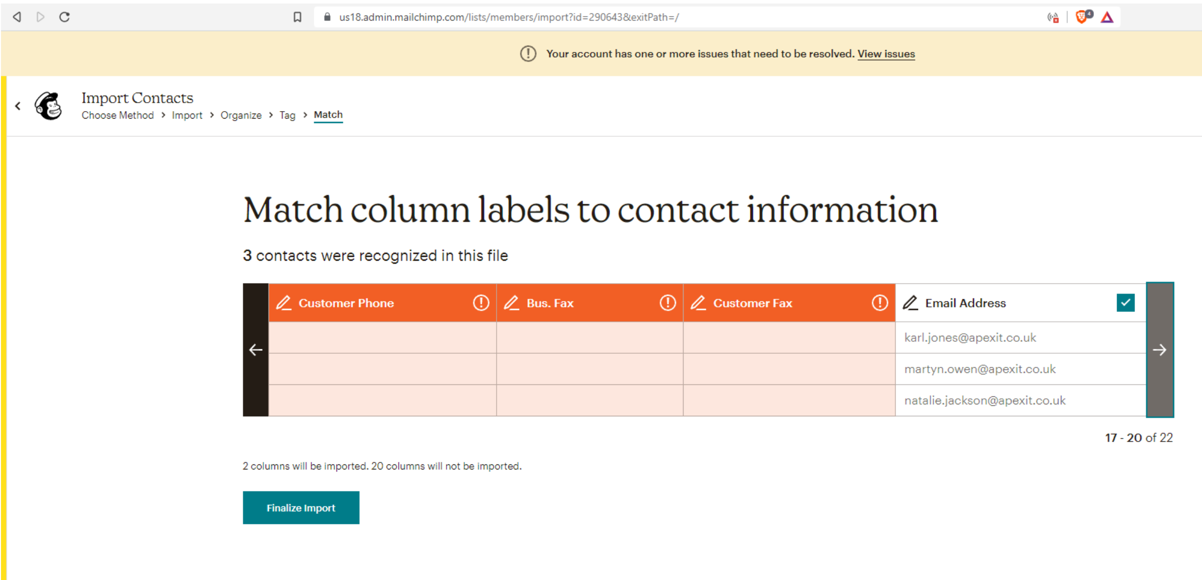


It should automatically recognise the fields



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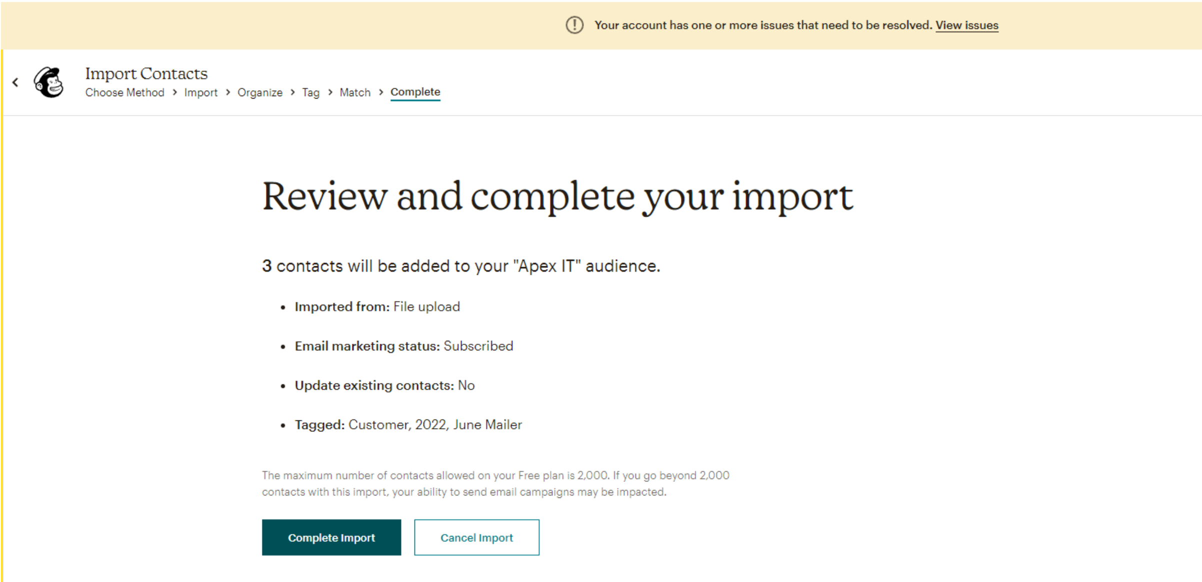
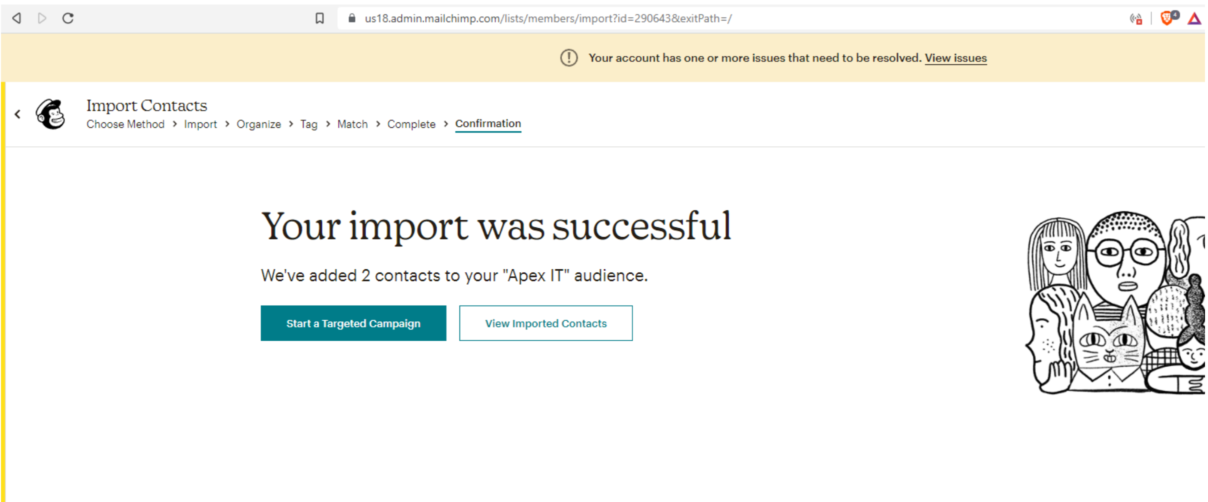


Review your import and complete it



NB. The next step is to generate the email you wish to send and send it to the contacts you have imported. That is beyond the scope of this document and will be covered by mail chimp documentation. Once you have created the mailer you can return to Interprise and create the campaign.

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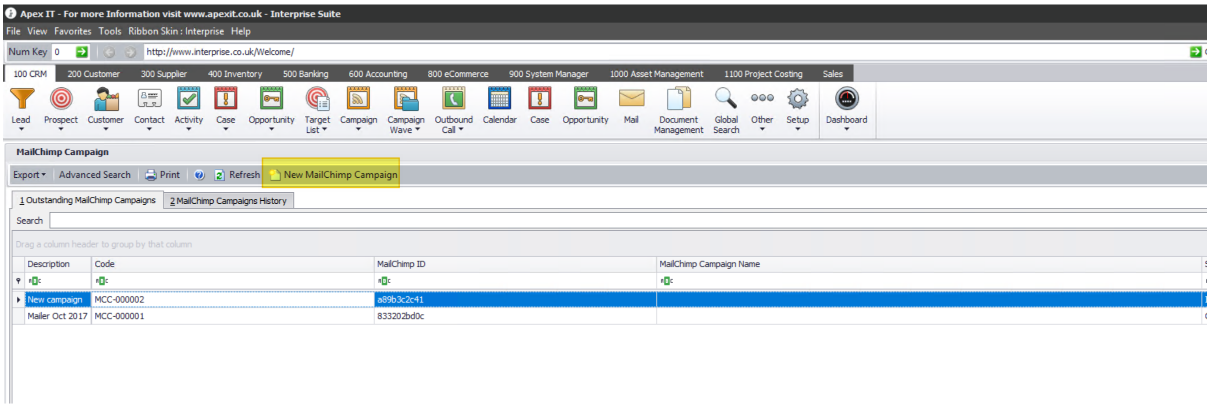
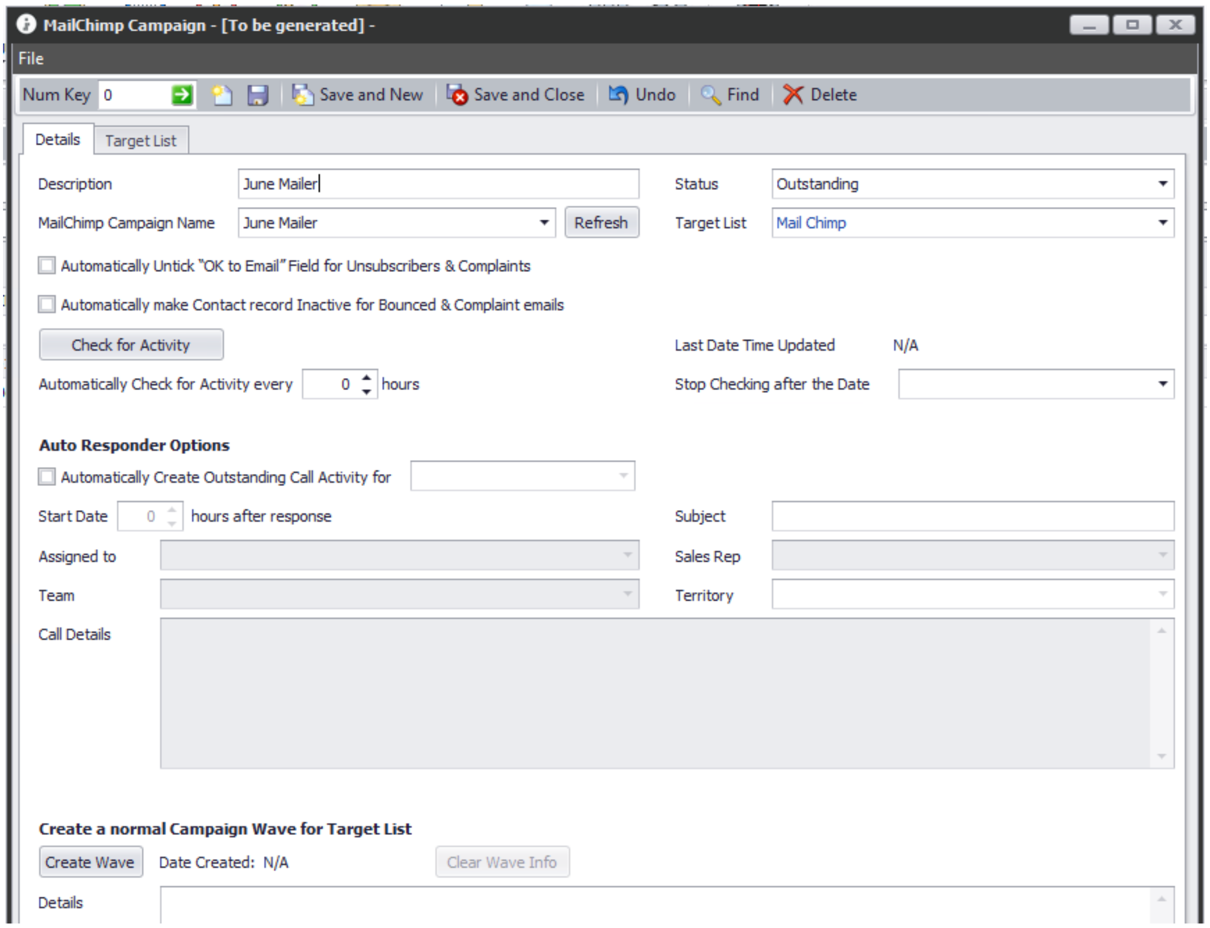
Creating a Campaign in Interprise



Open the Mail Chimp plugin from the Other tab in CRM and click New MailChimp Campaign



Type a description, press the refresh to load the campaigns from mail chimp (if you get an error make sure you have closed Interprise since adding the API key) and then pick the Target List you uploaded.

You can then check for activity although the service running on the server should do this periodically, this will feed back opens which you can see in the Target list tab

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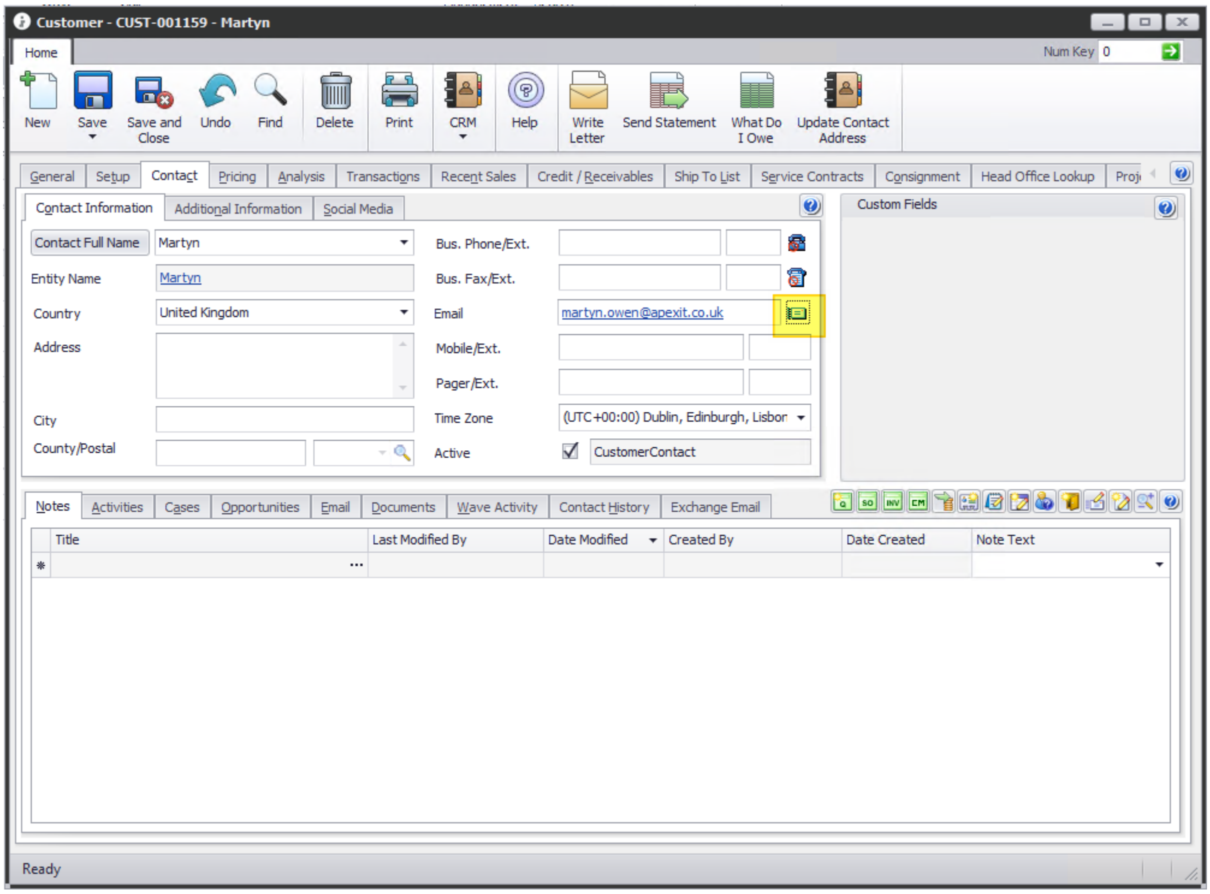
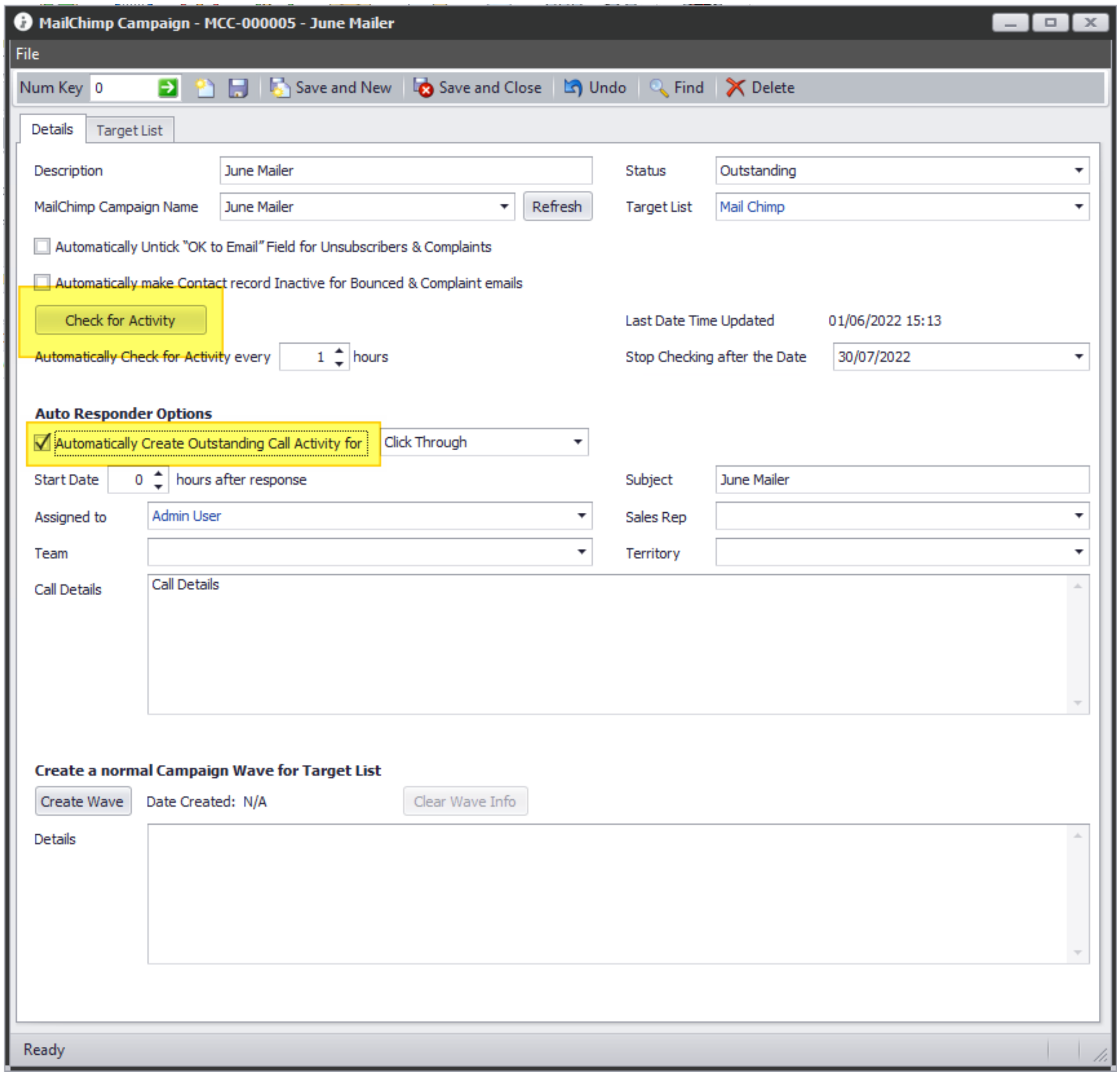
Automatically untick Ok to email field for Un-subscribers and Complaints option. When ticked if we get these responses from Mailchimp them the email field will be marked as not ok to email.

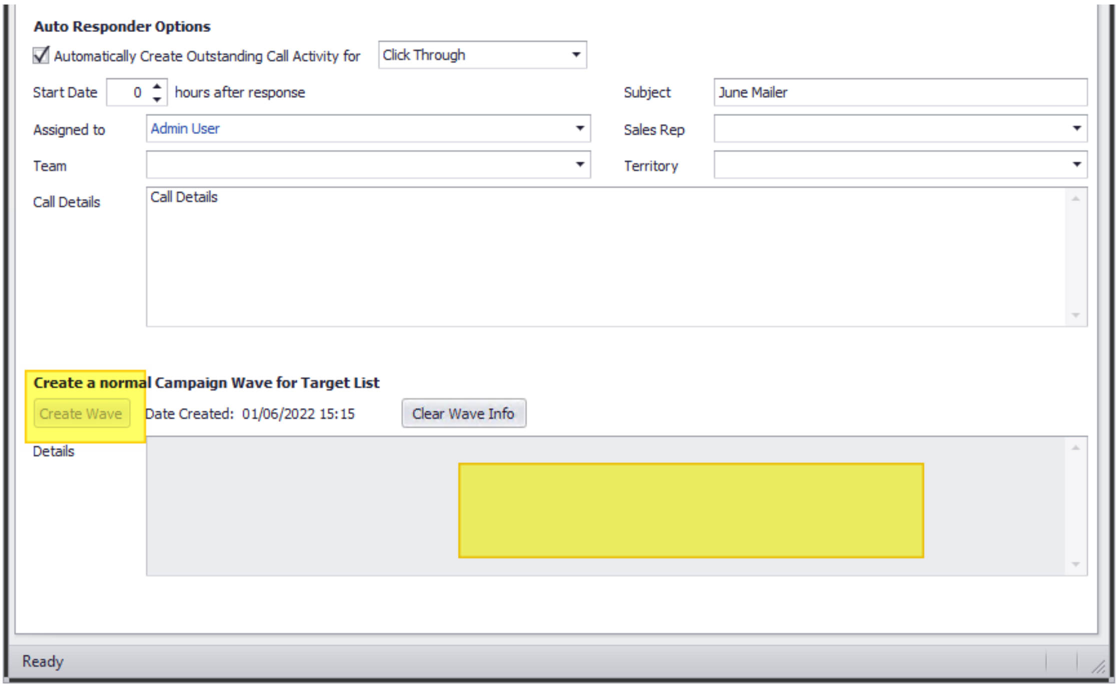


The "automatically make a record inactive for complaints" is self-explanatory.

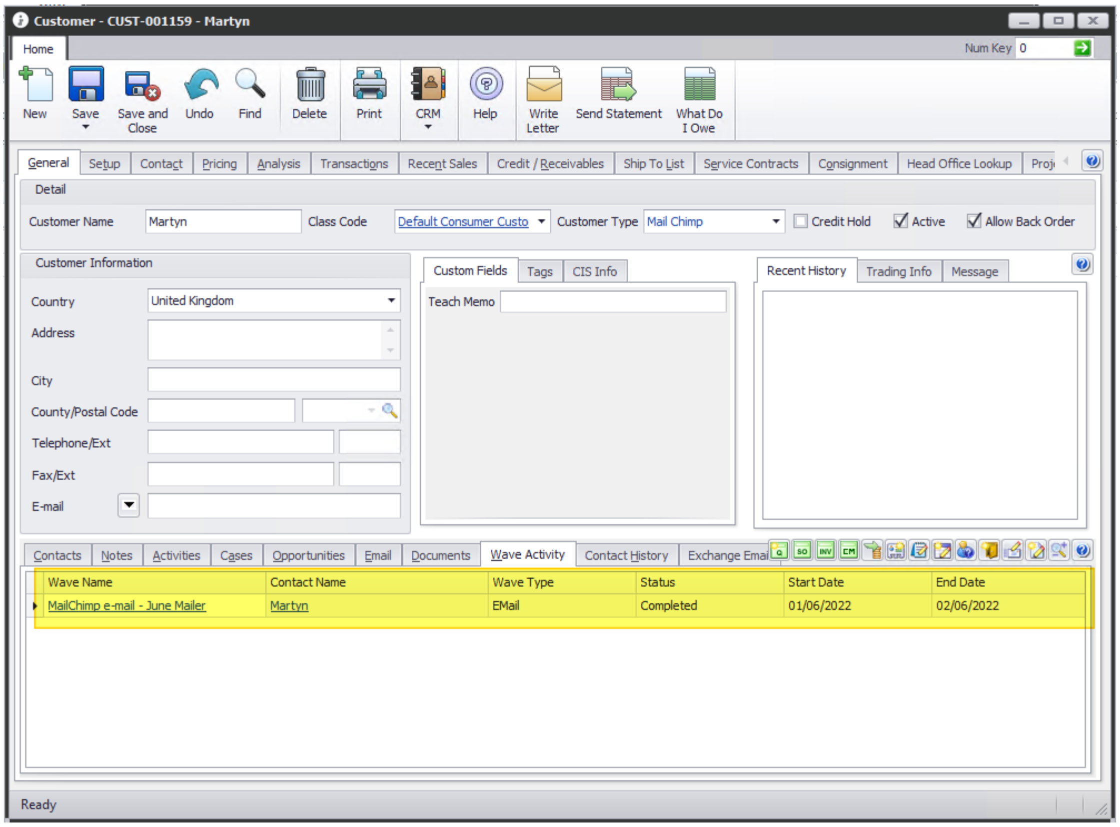


The check for activity button allows you to manually check for any updates or click throughs and opens. Below this we have a service that will automatically check every X hours stopping at a certain date. So, you may set this to check every hour and stop 3-5 days after the email has been sent. This automatic update means you don't have to come back to the campaign to automatically click check for activity button.

You can do email auto responders in Mailchimp. We have added the ability to do an Activity auto responder in Interprise. The most common requirement is that when someone clicks through one of your links in an email (because we assume they are interested) not just open the email, we can auto create a call activity within Interprise so they are followed up. You can set a start date maybe you want to follow them up immediately or several days after they click through. The Subject and User Assigned, Team, Rep, Territory and call details notepad all get put into the call activity created. So you could assign this is a user or team or both to make the call. I would suggest putting a copy of the email into the call details notepad so the user knows what the call is about and Click Through at the top so the user knows it because they clicked through when looking at the call activity.



The create normal campaign wave for target list button can be used to mark the records that they have had this email shot from Mailchimp. It would be a good idea to put the content of the email into the notepad details so when the campaign is created this information is there. This then displays with other normal campaigns a customer has received. It's a button so its optional.



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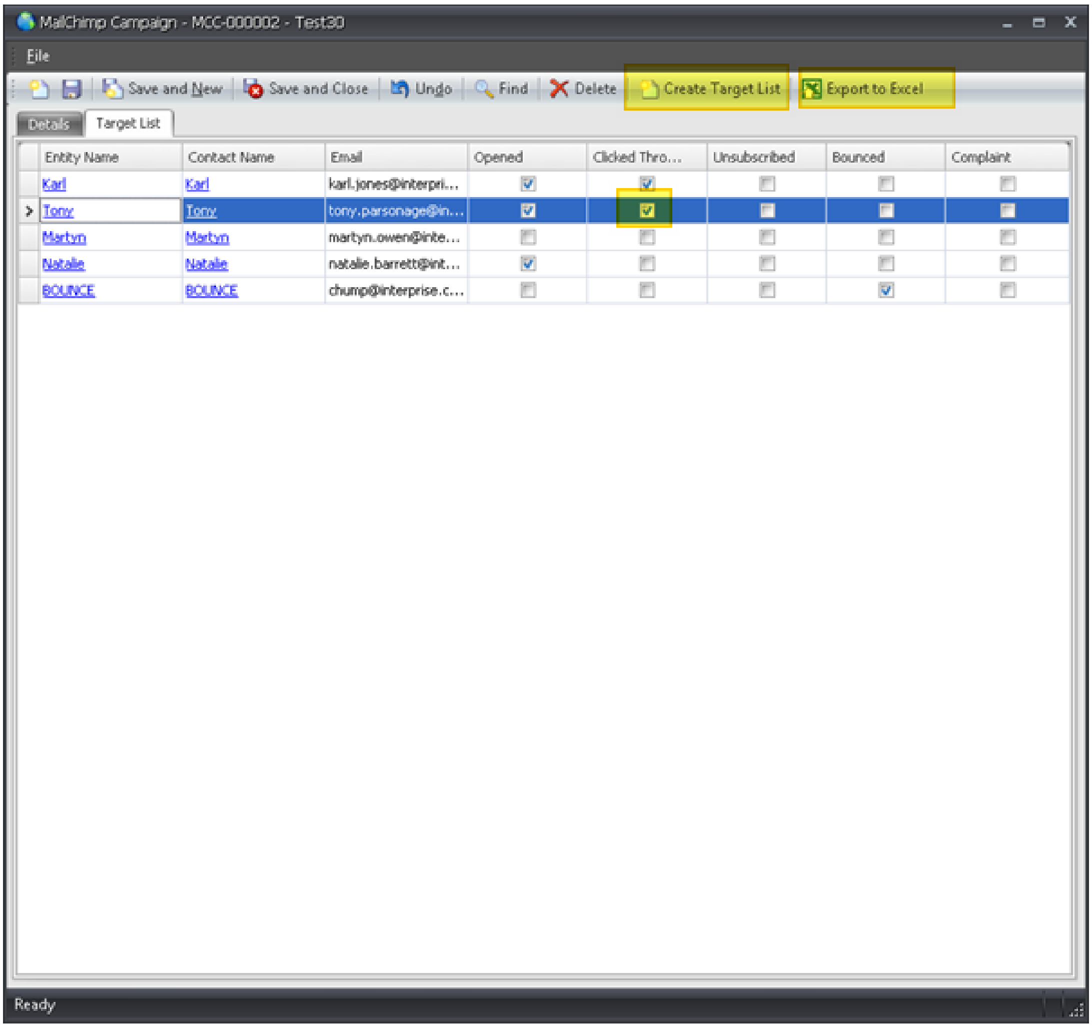
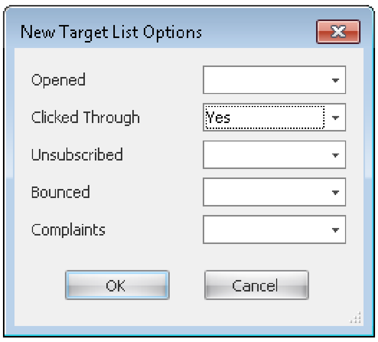


We can see from the target list tab in the campaign who opened the email. Clicked through a link etc. This information can also be used to create an excel file using the toolbar button or create a new target list with this information.

If a user clicks on create a new target list, they are asked to include which records. E.g., you may just want the records that clicked through on a link. You get the following options:



You can then decide to do a mailer, call list, email or fax in Interprise or another Mailchimp email shot to these records using this target list.