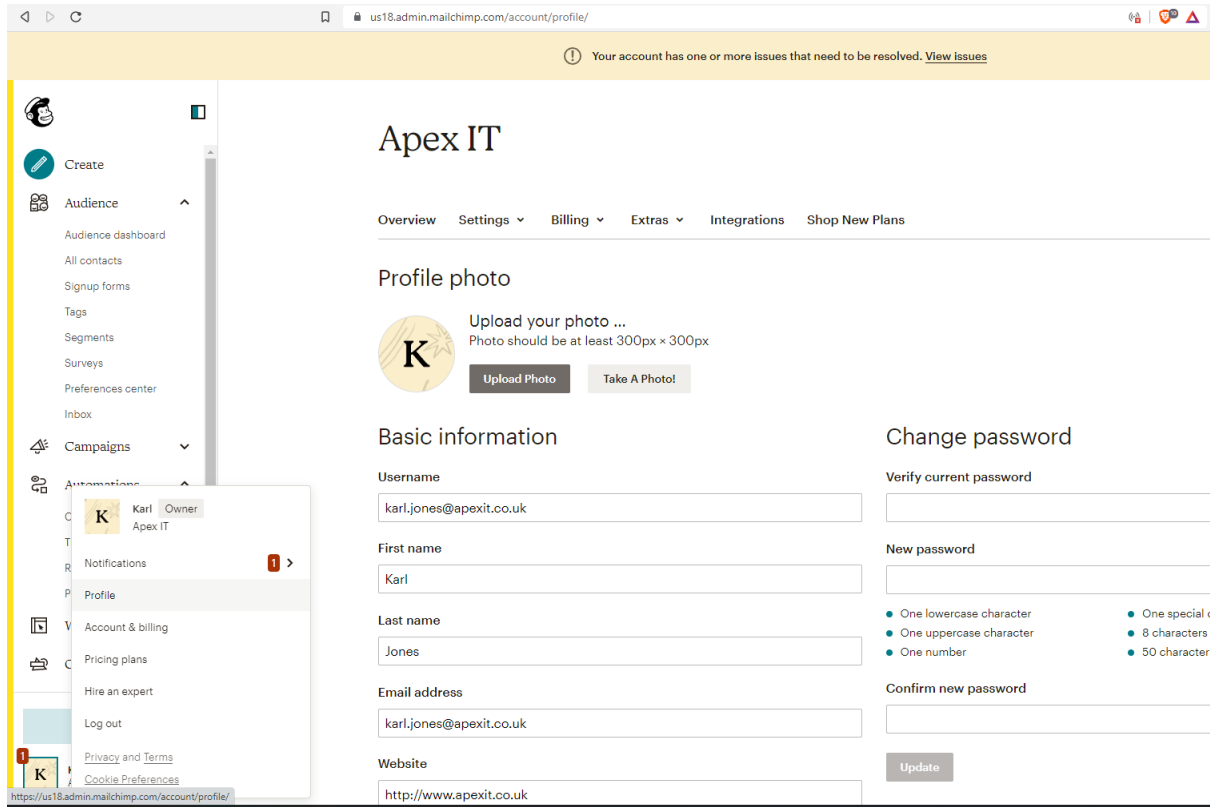




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## Mailchimp Integration

### Getting an API KEY



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

## Apex IT

Overview Settings Billing Extras Integrations Shop New Plans

### Profile photo



Upload your photo ...  
Photo should be at least 300px x 300px

Upload Photo

Take A Photo!

- Referrals
- API keys
- Registered apps

Click on extras and then API Keys



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# Mailchimp Integration

## API keys

### About the API

The Mailchimp API makes it easy for programmers to integrate Mailchimp's features into other applications.

[Read The API Documentation](#)

### Developing an app?

Writing your own application that requires access to other Mailchimp users' accounts? Check out our [OAuth2 API documentation](#), then register your app.

[Register And Manage Your Apps](#)

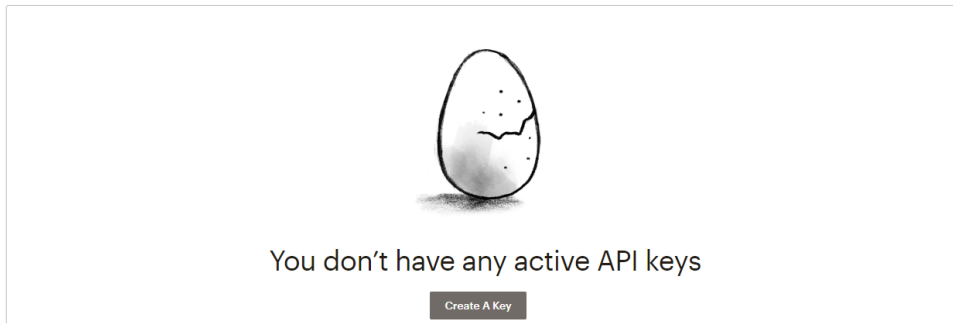
### Developer Tools

Have a mobile app? Want to add, update, or tag contacts, and track contact events in just a few lines of code? Check out our [Mobile SDK Documentation](#), and then create a client key to get started!

[Create A Client Key](#)

## Your API keys

API keys provide full access to your Mailchimp account, so keep them safe. [Tips on keeping API keys secure.](#)



Click create a Key

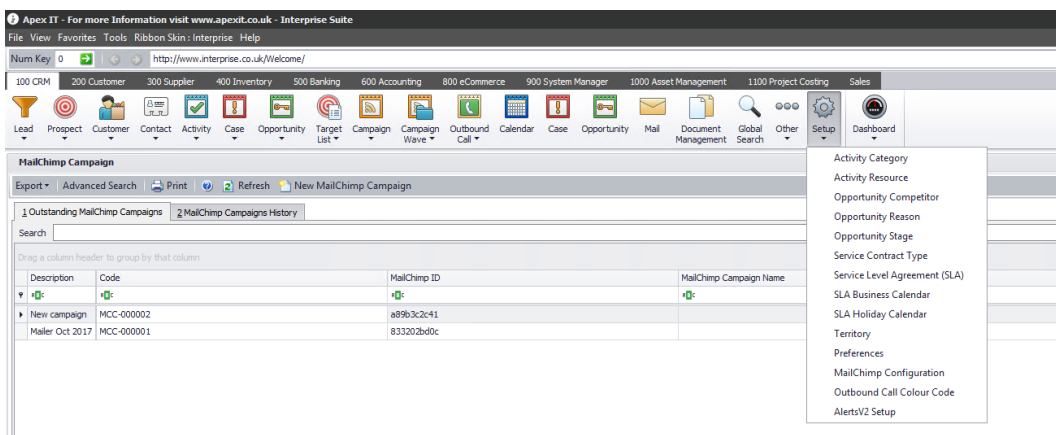
## Your API keys

API keys provide full access to your Mailchimp account, so keep them safe. [Tips on keeping API keys secure.](#)

Created	User	Label	API key	Status
May 31, 2022 5:53 am	Karl Jones (owner)	none set	1d415c	<input checked="" type="checkbox"/>

[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. **At this point close (not just log out) Interprise and reopen it.**



## Mailchimp Integration

### 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

Contact Name	Entity Name	Contact Address	Entity Address	Contact Phone
<a href="#">tony Parsonage</a>	<a href="#">Tony Parsonage</a>	United Kingdom	United Kingdom	
<a href="#">Karl</a>	<a href="#">Karl</a>	United Kingdom	United Kingdom	
<a href="#">Martyn</a>	<a href="#">Martyn</a>	United Kingdom	United Kingdom	
<a href="#">Natalie</a>	<a href="#">Natalie</a>	United Kingdom	United Kingdom	

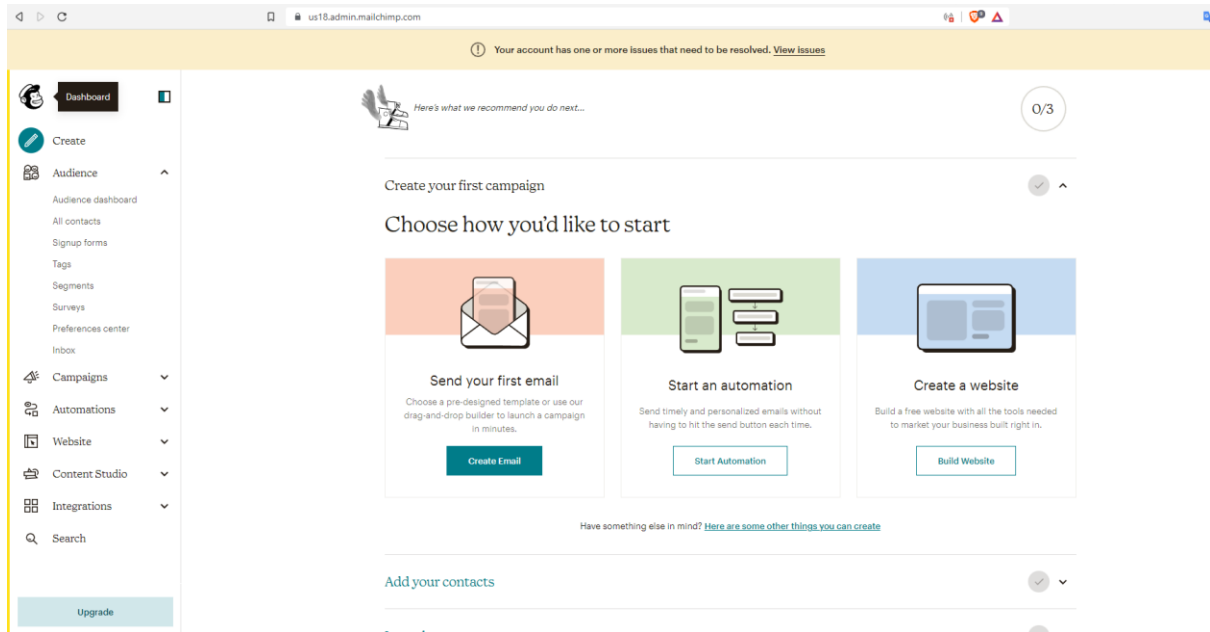
**You will need to open the file in excel and save it as CSV**



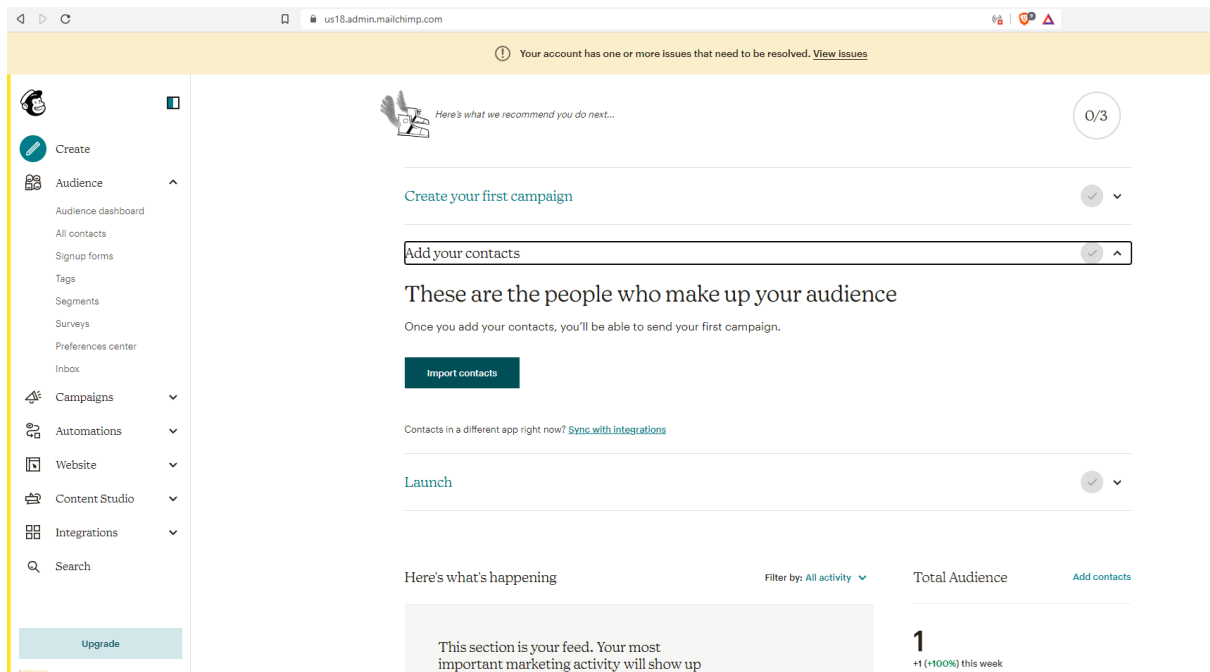
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## Mailchimp Integration

Return to mail chimp and follow the screen shots



Click on Add your contacts



Click on import Contacts



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## Mailchimp Integration

us18.admin.mailchimp.com/lists/members/import?id=290643&exitPath=/

Your account has one or more issues that need to be resolved. [View issues](#)

### Import Contacts

Choose Method

## How would you like to add contacts?

Build your Mailchimp audience by adding or importing contacts you already have permission to market to. [Learn how consent impacts email delivery](#)

- Import from another service  
Add contacts automatically from tools you already use.
- Upload a file  
Import contacts from a CSV or tab-delimited TXT file. [More info](#)
- Copy and paste  
Directly paste in new contacts from a spreadsheet or similar list.

[Continue](#)

Click on Upload file

us18.admin.mailchimp.com/lists/members/import?id=290643&exitPath=/

Your account has one or more issues that need to be resolved. [View issues](#)

### Import Contacts

Choose Method > [Import](#)

## Upload your contacts

[Browse](#)

[Continue to Organize](#)

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

us18.admin.mailchimp.com/lists/members/import?id=290643&exitPath=/

Your account has one or more issues that need to be resolved. [View issues](#)

### Import Contacts

Choose Method > [Import](#) > [Organize](#)

## Organize your contacts

Select a status

Subscribed

When you choose the "Subscribed" status for your contacts, it indicates that you've gained permission to market to them. Learn more about the [Importance of Permission](#).

Update any existing contacts  
If any imported contacts are already in your audience, we'll automatically replace their information with the data from your import. This option may make the import process take longer.

[Continue to Tag](#)



# Mailchimp Integration

us18.admin.mailchimp.com/lists/members/import?id=290643&exitPath=/

Your account has one or more issues that need to be resolved. [View issues](#)

Import Contacts  
Choose Method > Import > Organize > **Tag**

## Tag your contacts

Easily organize your contacts using simple words or phrases that make the most sense to you.

Search for or create tags

Customer X 2022 X June Mailer X

Choose from popular tags

2021 Staff Influencer Member

Start typing to add a custom tag

**Continue To Match**

It should automatically recognise the fields

us18.admin.mailchimp.com/lists/members/import?id=290643&exitPath=/

Your account has one or more issues that need to be resolved. [View issues](#)

Import Contacts  
Choose Method > Import > Organize > Tag > **Match**

## Match column labels to contact information

3 contacts were recognized in this file

Customer Phone	Bus. Fax	Customer Fax	Email Address
			karl.jones@apexit.co.uk
			martyn.owen@apexit.co.uk
			natalie.jackson@apexit.co.uk

2 columns will be imported. 20 columns will not be imported.

**Finalize Import**

17 - 20 of 22



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## Mailchimp Integration

ⓘ Your account has one or more issues that need to be resolved. [View issues](#)

Import Contacts  
Choose Method > Import > Organize > Tag > Match > Complete

### Review and complete your import

3 contacts will be added to your "Apex IT" audience.

- Imported from: File upload
- Email marketing status: Subscribed
- Update existing contacts: No
- Tagged: Customer, 2022, June Mailer

The maximum number of contacts allowed on your Free plan is 2,000. If you go beyond 2,000 contacts with this import, your ability to send email campaigns may be impacted.

[Complete Import](#) [Cancel Import](#)

### Review your import and complete it


us18.admin.mailchimp.com/lists/members/import?id=290643&exitPath=/  
ⓘ Your account has one or more issues that need to be resolved. [View issues](#)

Import Contacts  
Choose Method > Import > Organize > Tag > Match > Complete > Confirmation

### Your import was successful

We've added 2 contacts to your "Apex IT" audience.

[Start a Targeted Campaign](#) [View Imported Contacts](#)

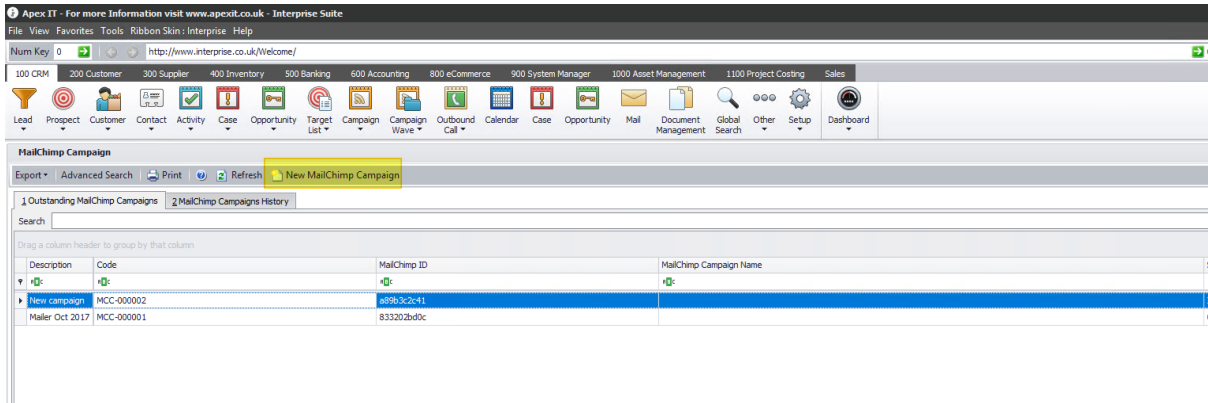


**NB. The next step is to generate the email you wish to send and send it to the contacts you have imported. That is beyond the scope of this document and will be covered by mail chimp documentation. Once you have created the mailer you can return to Interprise and create the campaign.**

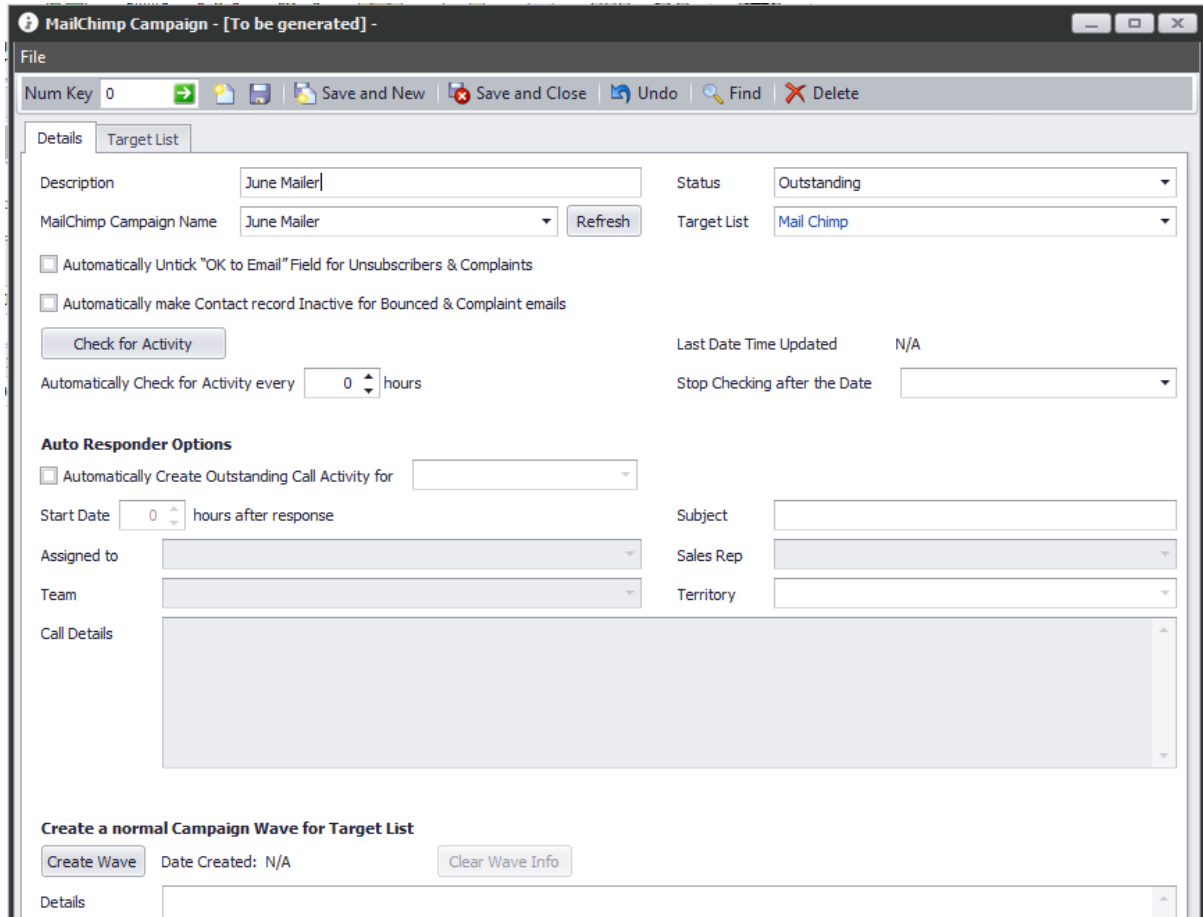


## Mailchimp Integration

### Creating a Campaign in Interprise



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



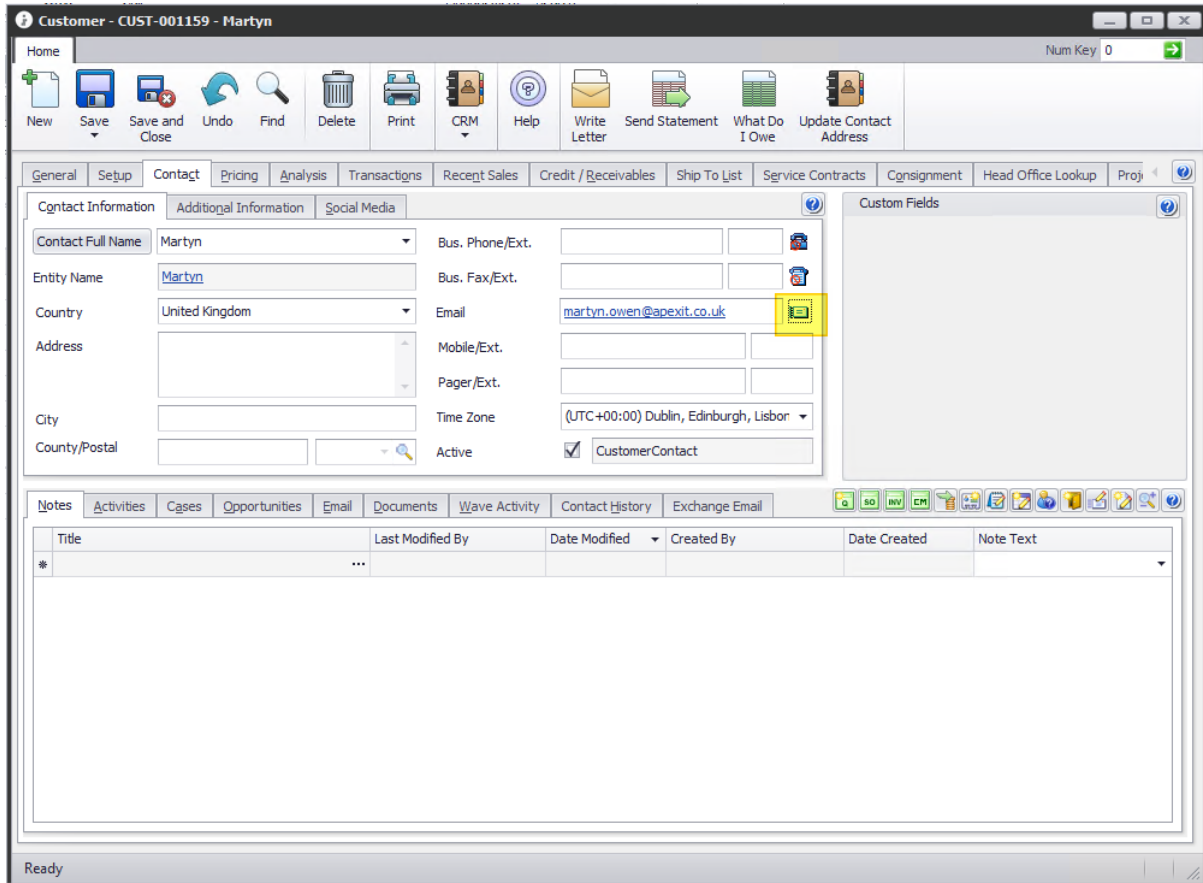
Type a description, press the refresh to load the campaigns from mail chimp (if you get an error make sure you have closed Interprise since adding the API key) and then pick the Target List you uploaded.

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



## Mailchimp Integration

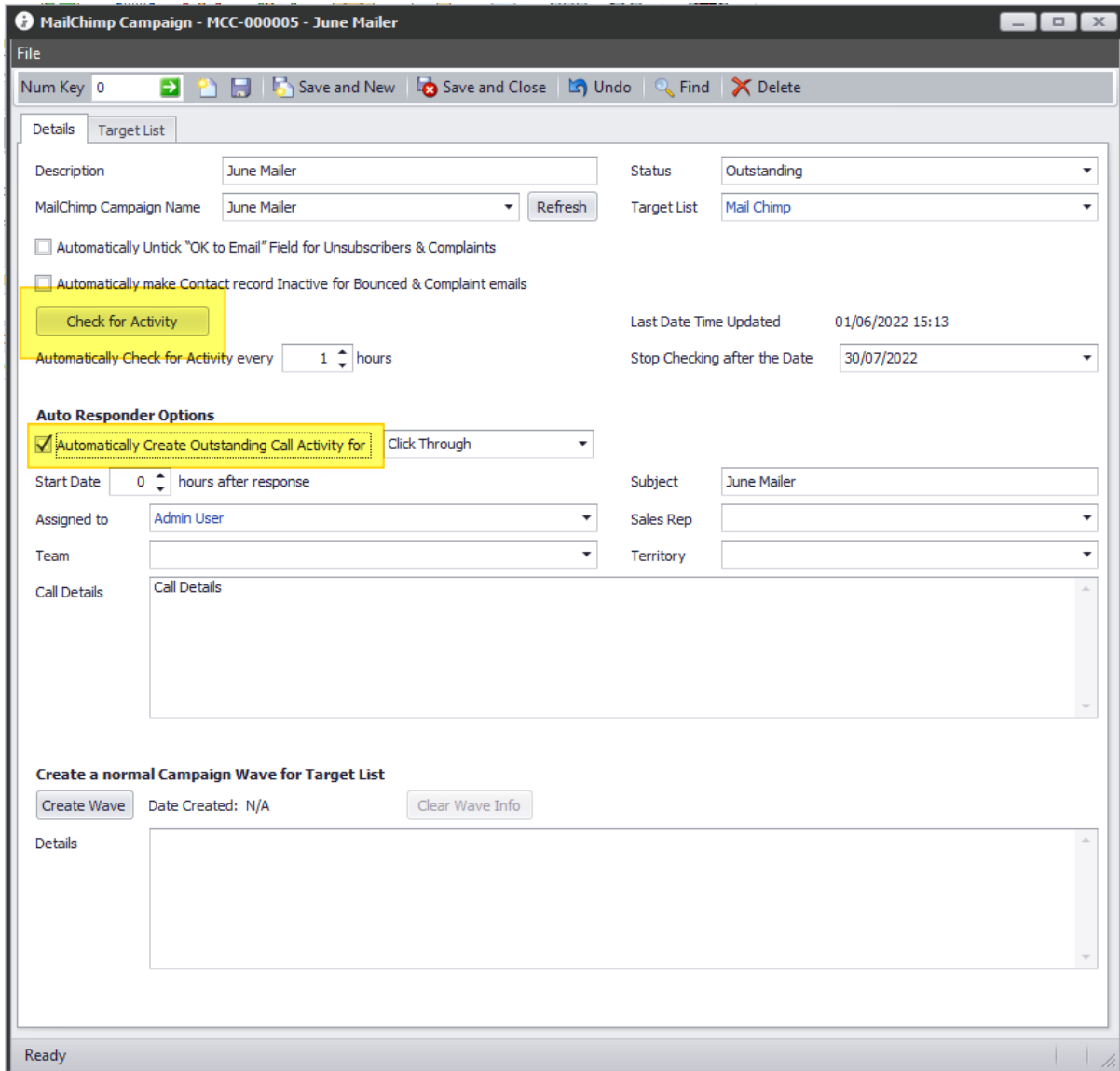
Automatically untick Ok to email field for Un-subscribers and Complaints option. When ticked if we get these responses from Mailchimp then the email field will be marked as not ok to email.



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



## Mailchimp Integration



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.



## Mailchimp Integration

**Auto Responder Options**

Automatically Create Outstanding Call Activity for Click Through

Start Date 0 hours after response      Subject June Mailer

Assigned to Admin User      Sales Rep

Team       Territory

Call Details Call Details

**Create a normal Campaign Wave for Target List**

Create Wave      Date Created: 01/06/2022 15:15      Clear Wave Info

Details

Ready

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.

Customer - CUST-001159 - Martyn

Home      Num Key: 0

New Save Save and Close Undo Find Delete Print CRM Help Write Letter Send Statement What Do I Owe

General Setup Contact Pricing Analysis Transactions Recent Sales Credit / Receivables Ship To List Service Contracts Consignment Head Office Lookup Proj

**Detail**

Customer Name Martyn      Class Code Default Consumer Custe      Customer Type Mail Chimp       Credit Hold       Active       Allow Back Order

**Customer Information**

Country United Kingdom

Address

City

County/Postal Code

Telephone/Ext

Fax/Ext

E-mail

**Custom Fields**      Tags      CIS Info

Teach Memo

**Recent History**      Trading Info      Message

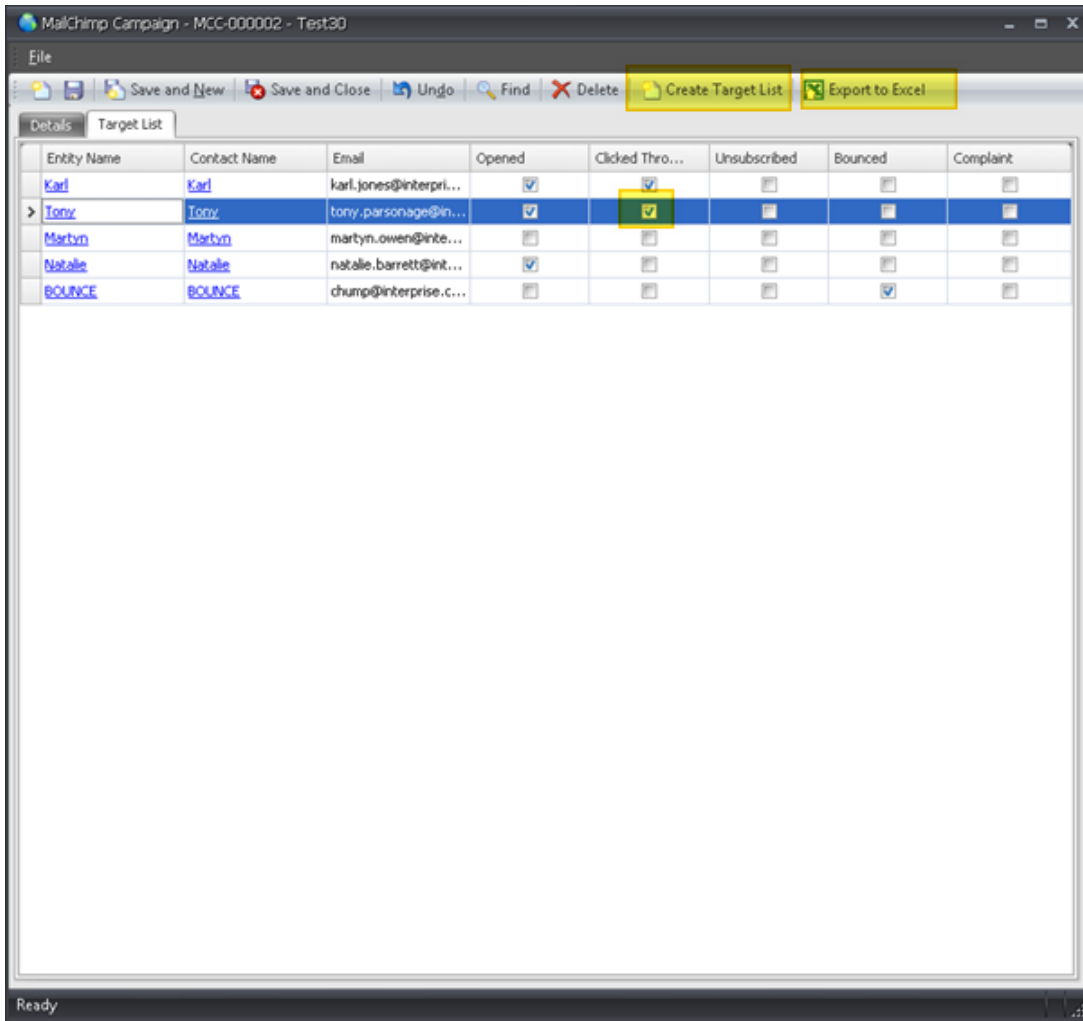
**Wave Activity**

Wave Name	Contact Name	Wave Type	Status	Start Date	End Date
MailChimp e-mail - June Mailer	Martyn	Email	Completed	01/06/2022	02/06/2022

Ready

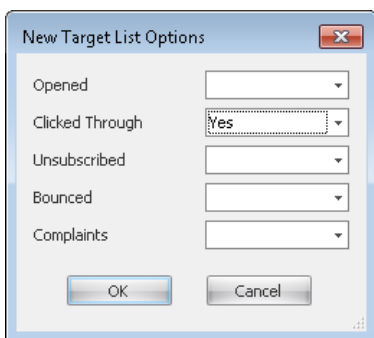


## Mailchimp Integration



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.



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## **Mailchimp Integration**