

MailChimp connector for Creatio

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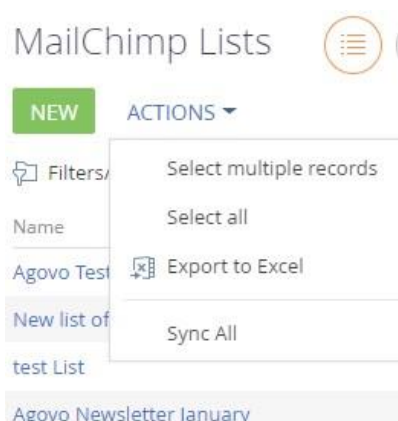
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Initial Setup

1. Install the MailChimp App from the Creatio Marketplace
<https://academy.creatio.com/documents/studio/7-11/installing-applicationsmarketplace>
2. Once Installed, go to [System Designer] > in the [Import and Integration] area, click [Authenticate MailChimp]
3. Enter your MailChimp username and password. Sign In.
4. You should now be redirected back to Creatio. If successful, you should receive a success notification.

Synchronisation

- MailChimp connector synchronises automatically on a scheduler based on the “MailChimp Refresh Interval (Minutes)” System setting. By default, its every 2 hours.
- You can synchronise all the lists manually, by going to [MailChimp] Section > Actions menu > [Sync All].



- If you want to synchronise an individual survey, go to the MailChimp List record and click the “SYNC” button.

Agovo CRM Demonstration

CLOSE ACTIONS SYNC

- During synchronisation, by default the connector will create new contacts if they do not exist. You can disable the creation of contacts using the “MailChimp Create Contacts” System setting.

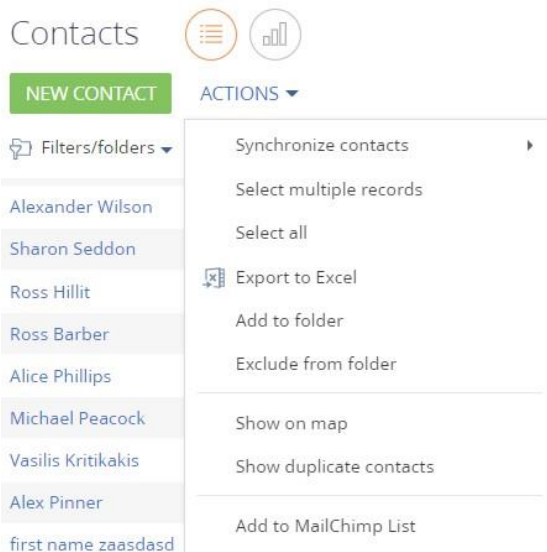
Create MailChimp Lists

MailChimp Lists can be created directly from Creatio using the standard New/Copy buttons in the MailChimp List section. You need fill out all the required fields in the List Settings tab along with entering an appropriate name for the list. Copying an existing synchronised list will save time if the list campaign defaults and contact details are the same.

Members can be added from the contact section or by using an automated business process based on a specified event.

Adding members (subscribers) from Contact Section

1. In the [Contact] section, select one or more Contacts.
2. Click on the [Actions] Button > [Add to MailChimp List]



3. Select the list you wish to add the contacts to.

Adding Contact to List using Business Processes

If you want to automate contacts, you will need to create a new business process that links with the existing “MC - Add contacts to List” business process

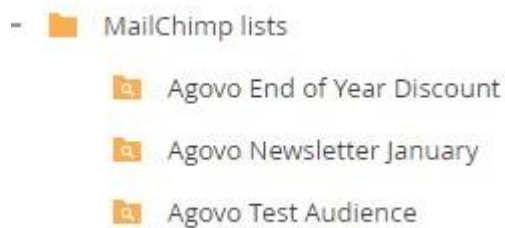
The “MC - Add contacts to List” BP should be used as a sub process. The only 2 parameters that need to be filled out are:

- **1. Contact ID:** The Id of the contact you wish to add to the list
- **2. MailChimp list:** The Id of the Synchronised MailChimp List

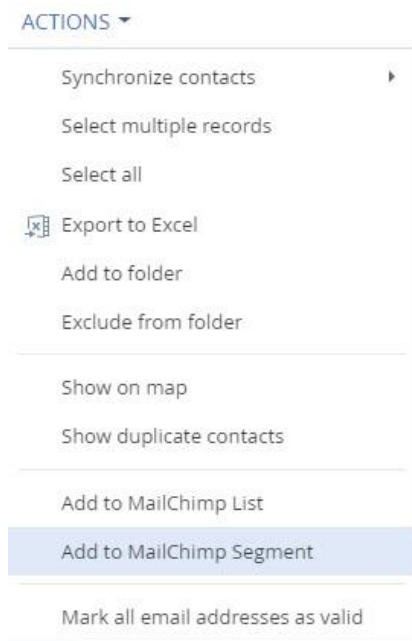
MailChimp Segments

MailChimp Segments can be created and populated from the Contact section, using the actions menu. You first need to select the List, by going into the contact Folder > “MailChimp Lists”.

1. In the [Contact] section, Select [Filters/Folders] > [Show Folders]
2. Find the folder [MailChimp Lists] and select the list you want to add the segment to.



3. Select one or more Contacts
4. Click on the [Actions] Button > [Add to MailChimp Segment]



5. Create a new or select an existing segment using the 2 options available.

Create new or select an existing segment



MailChimp List* Agovo End of Year Discount

New Segment Name

Existing Segment

6. Click Next. You will then receive a summary of how many contacts were added and the number of errors. The error usually means the contact already exists in the segment.