Setup Guide:

MailChimp for Salesforce

Powered by SyncApps CAZOOMI

Select your SyncApps

Integrating your Cloud, On-Premise or Plug-in application with your Financials, Marketing, eCommerce, Support, and other mission-critical applications is now a reality.

Questions? Contact our 24/7 support team.

Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

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Register your Credentials

Signing up for an account is as easy as putting in your Email, Name, Company Name and choosing your password. After you create an account, you and your company will get instant access to all Sync Profiles for 2 weeks, and we don't require a credit card during the trial, so you get to try Cazoomi risk-free.

START YOUR SYNCAPPS FREE TRIAL TODAY

Experience 2 weeks trial with access to all SyncApps, on-demand sync ability and more!

EMAIL ADDRESS

Email address will be used for login.

FIRST NAME

LAST NAME

COMPANY NAME

PASSWORD

6-characters minimum; case sensitive

RE-TYPE PASSWORD

By pressing "Start Free Trial", you agree to Cazoomi's Terms of Service and Privacy Policy.

🔒 START FREE TRIAL

How Your Trial Works

After you create your account, you get instant access to all Sync Profiles for 2 weeks & we don't require a credit card during the trial, so you get to try Cazoomi risk-free.

If you haven't upgraded yet within the 2 weeks trial, our Cazoomi team will send you an email reminder before your trial ends so you will still have some time to choose one of our three subscription plans.

When you choose the subscription plan that is right for you, your account will be instantly upgraded.

Join These Happy SyncApps Customers

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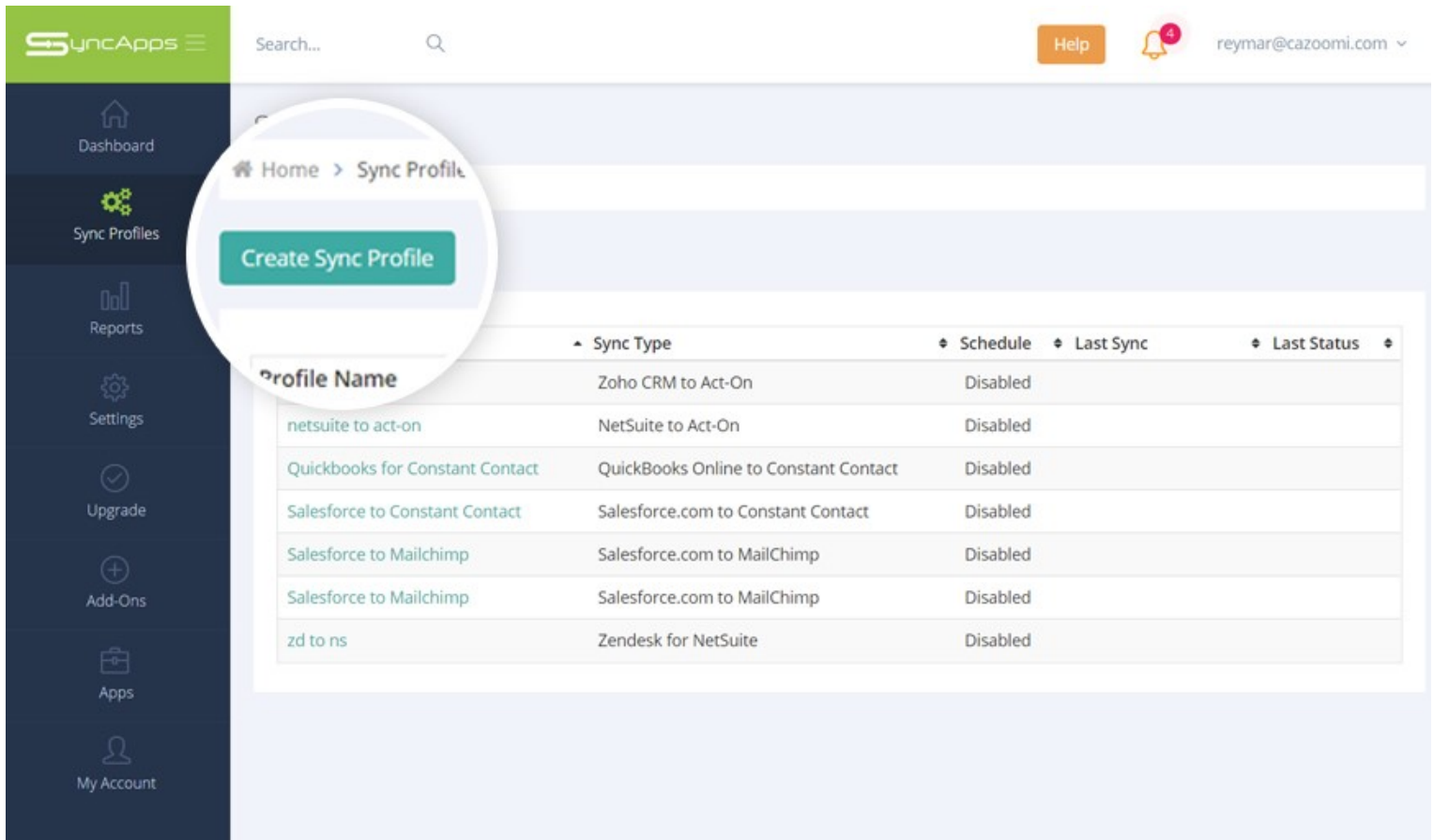
SyncApps   Powered by   CAZOOMI

MAJOR FEATURES

- Sync accounts (even Person Accounts), contacts, leads to MailChimp Lists and Groups.
- MailChimp Contact Rating seamlessly integrated back to CRM records.
- Sync and remove deleted records from CRM to MailChimp.
- Connect multiple CRM instances to multiple MailChimp Accounts.
- Easily select which Salesforce.com Object Type to be created when there is a new subscriber in MailChimp.
- Filter and Sync only those records which meet specific criteria from CRM. (Only Available on Paid Plans or as an Add-on)
- Quickly select specific Cazoomi Marketing List or Salesforce Campaign Record Types to sync to MailChimp List/Groups.
- Filter and Sync only those records who meet specific criteria from CRM.
- Salesforce Custom Checkbox to MailChimp List/Group segmentation feature. (Addon)
- Integrate List and Group membership automatically to CRM. (Cazoomi Marketing List required to be installed in Salesforce Org)
- Create and update new Contacts, Leads via MailChimp or CRM.
- Sync Opt-outs automatically. (Custom Opt-Outs supported via Custom Field Mapping)
- Custom field mapping between both systems.
- Sync all or just specific Salesforce Campaigns and Campaign Responses from MailChimp.
- Retrieve Email Campaigns in MailChimp and create an activity for each Campaign Response.
- Sync clicked URLs from Email Campaigns back to Salesforce.
- Trigger MailChimp Autoresponders from CRM field updates.
- Sync and map hard bounces to CRM custom field.
- Update CRM from MailChimp contact update forms.
- Salesforce always takes higher precedence over MailChimp. Any CRM record changes in Salesforce will always be synced to MailChimp.
- CRM record data is synced from MailChimp only if the email address doesn't exist in Salesforce at the time of syncing.

Select the Apps you use to get started as this will also include any Sync Add-Ons, field mapping or filters.

A Sync Profile refers to the setup of 2 available software applications where one application is synced to another application. This includes all the settings for both applications including connection configuration, field mapping, and Sync scheduling.
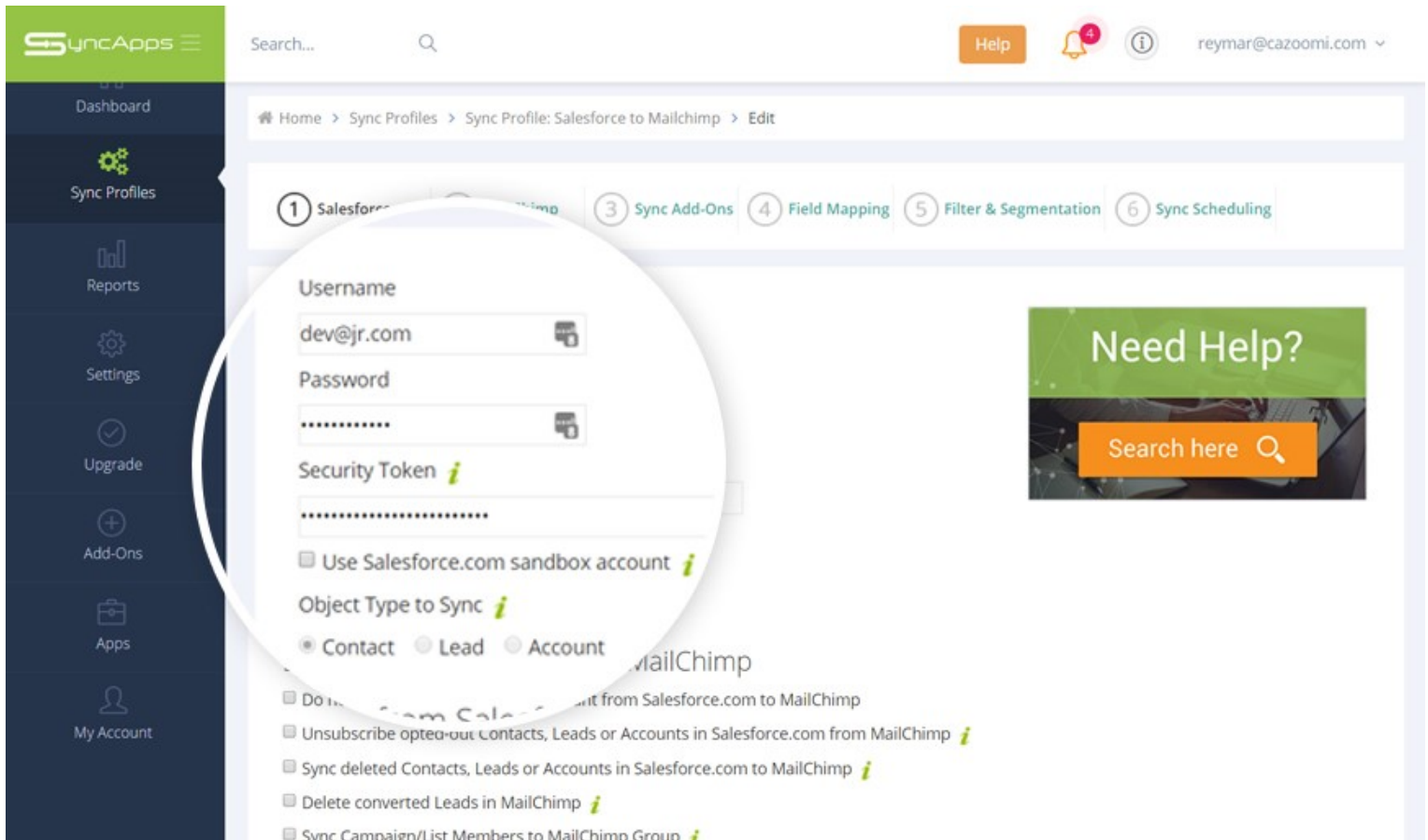
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The Sync Profile name is just a description for you to remember the Sync Profile that you will create now.

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Grab your Salesforce credentials, and if you have questions, please hover over any SyncNote tooltip to get more information.

Do not append your Salesforce password to the Security Token. If you do not know your security token, please follow steps in the following link to get your new security token: https://help.salesforce.com/apex/HTViewHelpDoc?id=user_security_token.htm. You can leave the security token blank but you will need to add SyncApps server IP Addresses (50.57.94.62 and 162.242.161.75) to your Salesforce.com trusted networks.

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To obtain your API key, hover over the SyncNotes for more information. Then, go to your MailChimp account, and select "Extras" then copy the API code.

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The SyncApps Add-Ons screen allows you to select those you want and more for each App you connect.

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Field mapping from your chosen App 1 & App 2 allows you to update existing or new records with ease.

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Filtering takes CRM record, filters based on the specified criteria and syncs records into your target application. Segmentation syncs record from each defined segment into separate lists.

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Sync scheduling can be set up on paid plans. Sync On-Demand is available in all trials to allow quick testing of your Apps integration.

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Press the "Sync Now" button from your Sync Profile screen to sync your data immediately.

Sync Profile: Salesforce to Mailchimp

🏠 Home > Sync Profiles > Salesforce to Mailchimp

☰ Summary

Plan Type: Enterprise (Tier-4)

Profile ID: 959352235

Status: Enabled

Created: 13 Nov 2017 20:57:58 CST

Sync Type: Salesforce.com to MailChimp

Object Type: Contact

Scheduling: Disabled

[✎ Edit] [⊘ Disable] [🗑 Delete] [▤ Copy]

○ Sync

...ng button to sync your Sync Profi...

Press th... ...tely.

⟳ Sync Now

...w button to Reset your Sync Profile. Ple... ...te - you will not lo... ...r previous settings in your Sync Pro...
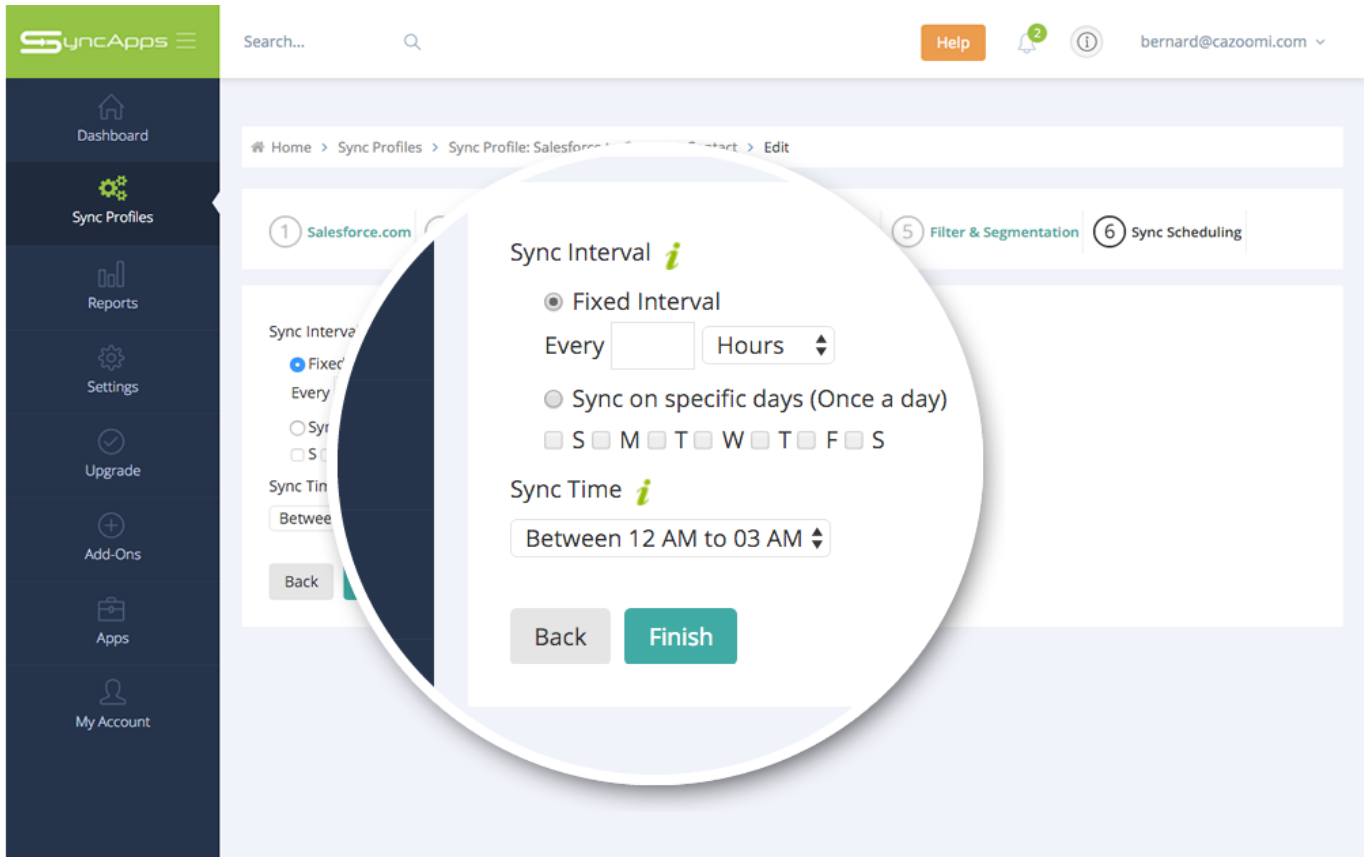
⊗ Reset Sync Proce...

📖 Sync History

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Reports

🏠 Home > Reports

📊 Updated Records this Month

● Updated
● Error

11,386

30,214

* For more detailed error report, please click the red area of the chart.

📊 Updated Records and Error Rate

04/26 04/27 04/28 04/29 04/30 05/01 05/02

■ Updated ■ Error

📊 Sync Speed

2,000

1,500

1,000

500

0

04/26 04/27 04/28 04/29 04/30 05/01 05/02

■ Updated ■ Total Processed — Sync Time (Minutes)

📊 Processed Records by Object Type

04/26 04/27 04/28 04/29 04/30 05/01 05/02

— Contact — Organization — Ticket

◄ 1/2 ►

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Cazoomi Story

SyncApps® by Cazoomi offers an integration framework available to unite your company's data.

Deploying Software-as-a-Service for Financials, CRM & Marketing, eCommerce or Support?

SyncApps® by Cazoomi is the easiest way to synchronize your applications without breaking the bank. Once available to only Fortune 1000 companies, Cazoomi introduces a way for your business applications to talk to each other for less than the price of a Netflix subscription.

See other small businesses, education and nonprofits to even large enterprises who started on a Free Trial.

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