

Setup Guide:

MailChimp for Salesforce

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.

The screenshot shows the top navigation bar with the Cazoomi logo, a 'Login' link, and a 'More About Cazoomi' button. The main menu includes 'HOW IT WORKS', 'PRICING', 'BLOG', 'NONPROFITS', 'SUPPORT', and a prominent orange 'GET STARTED' button. The hero section features the headline 'Sync Salesforce.com to MailChimp' and a 'Get Started' button with '2 Weeks Free' text. A pricing box indicates 'Plans Starting at \$49.99/month/company'. A diagram shows the Salesforce.com logo connected to the MailChimp logo via a plus sign. A secondary navigation bar contains icons for 'Major Features', 'Pricing', 'Product Support', 'How it Works', 'Get Help with Salesforce', 'About', and 'Videos'. The 'Major Features' section lists four bullet points: 'Salesforce Edition must have API Enabled.', 'Sync accounts (even Person Accounts), contacts, leads to MailChimp Lists and Groups.', 'MailChimp Contact Rating seamlessly integrated back to CRM records.', and 'Sync and remove deleted records from CRM to MailChimp.'



Questions? Contact our 24/7 support team.

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

Contact Us!

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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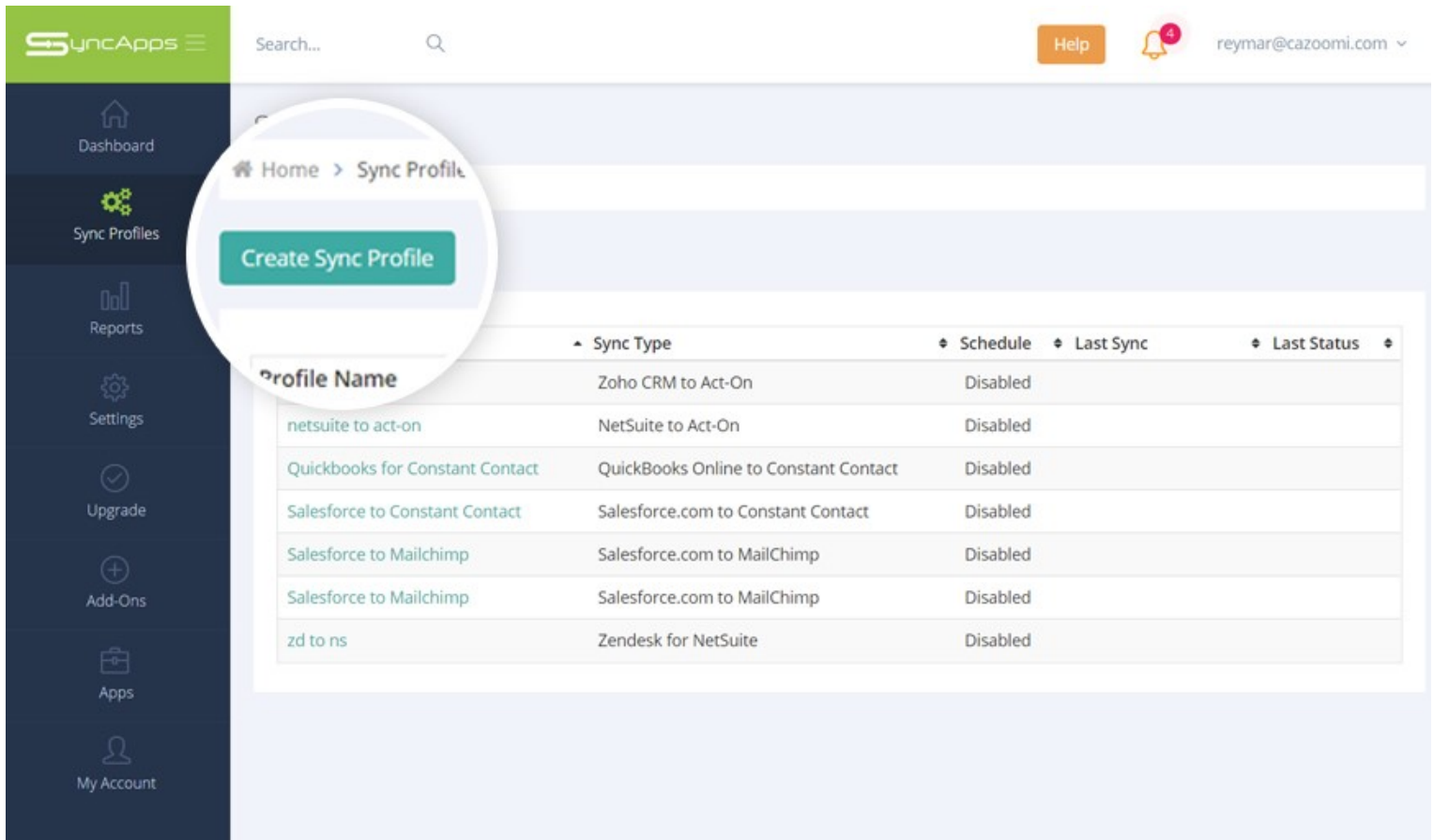
MAJOR FEATURES

- 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.

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Create Sync Profile

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



The screenshot shows the SyncApps dashboard interface. On the left is a dark blue sidebar with navigation icons for Dashboard, Sync Profiles, Reports, Settings, Upgrade, Add-Ons, Apps, and My Account. The main content area has a light blue header with a search bar, a 'Help' button, a notification bell with a red '4', and the user email 'reymar@cazoomi.com'. Below the header is a breadcrumb trail 'Home > Sync Profile' and a prominent green 'Create Sync Profile' button. A circular callout highlights this button. Below the button is a table of existing sync profiles.

Profile Name	Sync Type	Schedule	Last Sync	Last Status
	Zoho CRM to Act-On	Disabled		
netsuite to act-on	NetSuite to Act-On	Disabled		
Quickbooks for Constant Contact	QuickBooks Online to Constant Contact	Disabled		
Salesforce to Constant Contact	Salesforce.com to Constant Contact	Disabled		
Salesforce to Mailchimp	Salesforce.com to MailChimp	Disabled		
Salesforce to Mailchimp	Salesforce.com to MailChimp	Disabled		
zd to ns	Zendesk for NetSuite	Disabled		

 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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Enter Profile Name

The Sync Profile name is just a description for you to remember the Sync Profile that you will create now.

SyncApps

Search...

Help

reymar@cazoomi.com

Home > Sync Profiles > Create Sync Profile

Name ⓘ

Sync Type

Next

In the next few minutes you will select the Apps you use to get started and name the Sync Profile, which is just a description for you to remember the Sync Profile that you created.

After entering your App credentials in the next few steps if you have questions while on any step in your Sync Profile please hover over any SyncNote tooltip ⓘ to get detailed information on that specific integration service or related item.

Good luck on the Setup of your new Sync Profile!

See how he set it up!



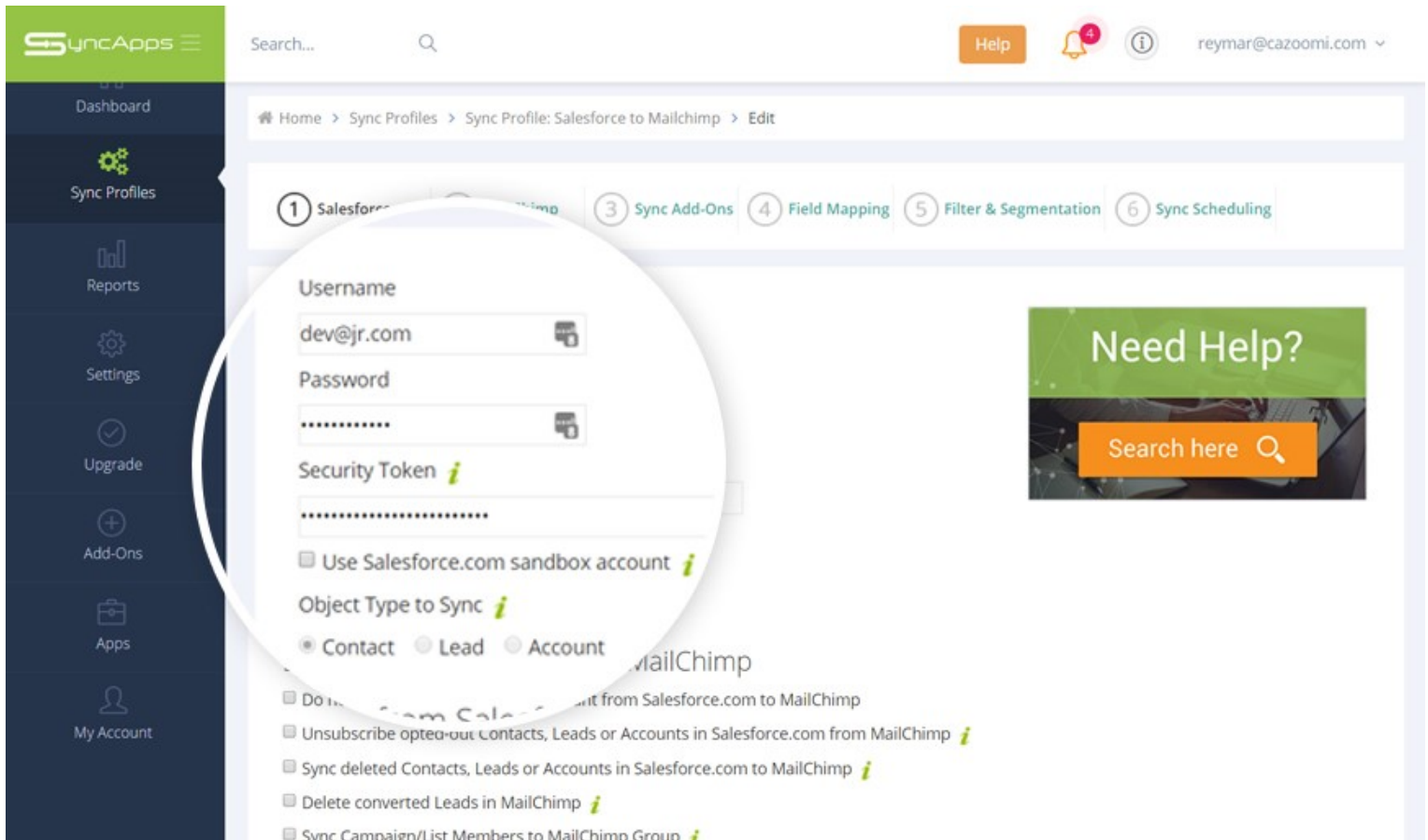
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3 Enter Salesforce Credentials

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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Insert your MailChimp Credentials

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.

The screenshot shows the 'Edit' page for a 'Sync Profile: Salesforce to MailChimp'. The breadcrumb trail is 'Home > Sync Profiles > Sync Profile: Salesforce to MailChimp > Edit'. A progress bar at the top indicates six steps: 1. Salesforce.com, 2. MailChimp (highlighted), 3. Sync Add-Ons, 4. Field Mapping, 5. Filter & Segmentation, and 6. Sync Scheduling. The 'API Key' field is highlighted with a white circle and contains a green information icon. Below it is the 'Sync Master List' field, currently set to 'From Salesforce Contacts'. The 'Group Title to Use' field is also highlighted with a white circle. A 'Need Help?' search box is located on the right side of the page.



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Sync Add-Ons

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

The screenshot shows the 'Sync Add-Ons' configuration page for a 'Salesforce to Mailchimp' sync profile. The breadcrumb trail is 'Home > Sync Profiles > Sync Profile: Salesforce to Mailchimp > Edit'. The navigation tabs include: 1. Salesforce.com, 2. Mailchimp, 3. Sync Add-Ons (active), 4. Field Mapping, 5. Filter & Segmentation, and 6. Sync Scheduling. A circular callout highlights the 'Periodic Full Sync Add-On (\$9.99/month)' section, which includes a 'Periodic Full Sync Schedule' dropdown menu currently set to 'Disable Full Sync'. Below this is the 'Get Satisfaction Add-On (Free)' section, which includes a 'Get Satisfaction' logo and a checkbox labeled 'Enable Get Satisfaction Addon'. A 'Back' button is visible at the bottom left of the callout. On the right side of the screen, there is a promotional banner that says 'Need more Add-Ons?' with a button that says 'Paid Add-Ons are here >'. The left sidebar contains navigation options: Dashboard, Sync Profiles, Reports, Settings, Upgrade, Add-Ons, Apps, and My Account.



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

Home > Sync Profiles > Sync Profile: Salesforce to Mailchimp > Edit

1 Salesforce.com 2 MailChimp 3 Sync Add-Ons 4 Field Mapping 5 Filter & Segmentation 6 Sync Scheduling

Enable Additional Mapping

Salesforce.com Field

MailChimp Field

Mapping Direction

Map

Salesforce.com to MailChimp

Fields with (*) are read only fields, cannot be mapped to a mapping target.

Add Mapping Refresh

Do Integration Yourself-DIY with field mappin... KFIT

If your new created fields are not available in the field selection list please press the above "Refresh Fields" button to retrieve latest fields data from Salesforce.com and MailChimp.

After adding new mapping please reset your SyncApps so all your data will be re-synced with the new mapping. [?](#)

Current Mapping



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Filter and Segmentation

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.

The screenshot displays the SyncApps web interface for configuring a sync profile. The breadcrumb trail is: Home > Sync Profiles > Sync Profile: Salesforce to Mailchimp > Edit. A progress bar at the top shows six steps: 1. Salesforce to Mailchimp, 2. Sync Add-Ons, 3. Field Mapping, 4. Filter & Segmentation (highlighted), and 5. Sync Scheduling. The main content area is titled 'Filter & Segmentation' and includes a warning: 'Date criteria please use YYYY-MM-DD format. Example: 2018-01-10. Numeric value should not contain comma or thousand separators.' Below this, there are radio buttons for 'AND' and 'OR', a dropdown menu for 'Member Rating', and a 'Next' button. At the bottom of the filter configuration, there are buttons for '+ Add filter', '+ Add group', and 'Delete'. A sidebar on the left contains navigation options: Dashboard, Sync Profiles, Reports, Settings, Upgrade, Add-Ons, Apps, and My Account. A 'Back' button is also visible at the bottom left of the main content area.



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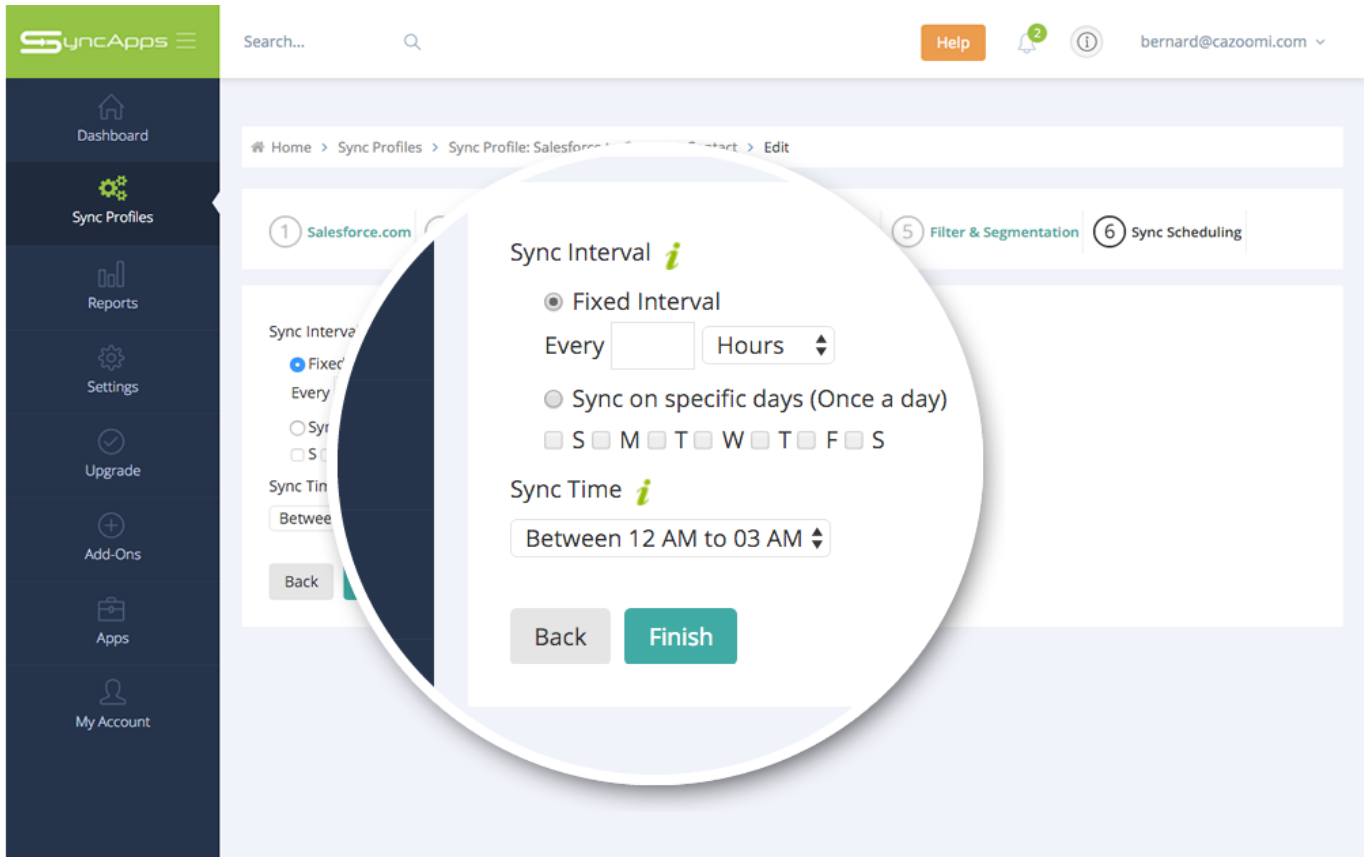
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Sync Scheduling

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

Press the **Sync Now** button to sync your Sync Profile immediately.

Press the **Reset Sync Process** button to Reset your Sync Profile. Please note - you will not lose your previous settings in your Sync Profile.

Reset Sync Process

Sync History



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[Contact Us!](#)

[Help](#)
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Dashboard
Sync Profiles
Reports
Settings
Upgrade
Add-Ons
Apps
My Account

Reports

Home > Reports

Updated Records this Month

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

Updated Records and Error Rate

Sync Speed

Processed Records by Object Type



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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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