

MailChimp document for installation & user flow.

1- MailChimp configuration:

Setup → Mailchimp → Mailchimp configuration

Mailchimp Configuration Details

Mailchimp package requirements:

Recommended: Standard (Data-driven automation and optimization tools for businesses that want to grow faster)
Minimum: Essentials (Great for email-only senders who want around-the-clock support)
<https://mailchimp.com/en-gb/pricing/marketing/>

To connect to MAILCHIMP please follow these instructions:

1. Follow link <https://mailchimp.com/en-gb/>
2. Login or Sign Up
3. Click on 'Account Name' bottom side menu.
4. Click on 'Account & Billing' menu.
5. Click on 'Extras' and choose 'Api keys' menu.
6. Click on 'Create A Key' Button.
7. Copy Api key.
8. Back in ZONVOIR TECHNOLOGIES PVT LTD..

Api Key

9. Mailchimp Sync

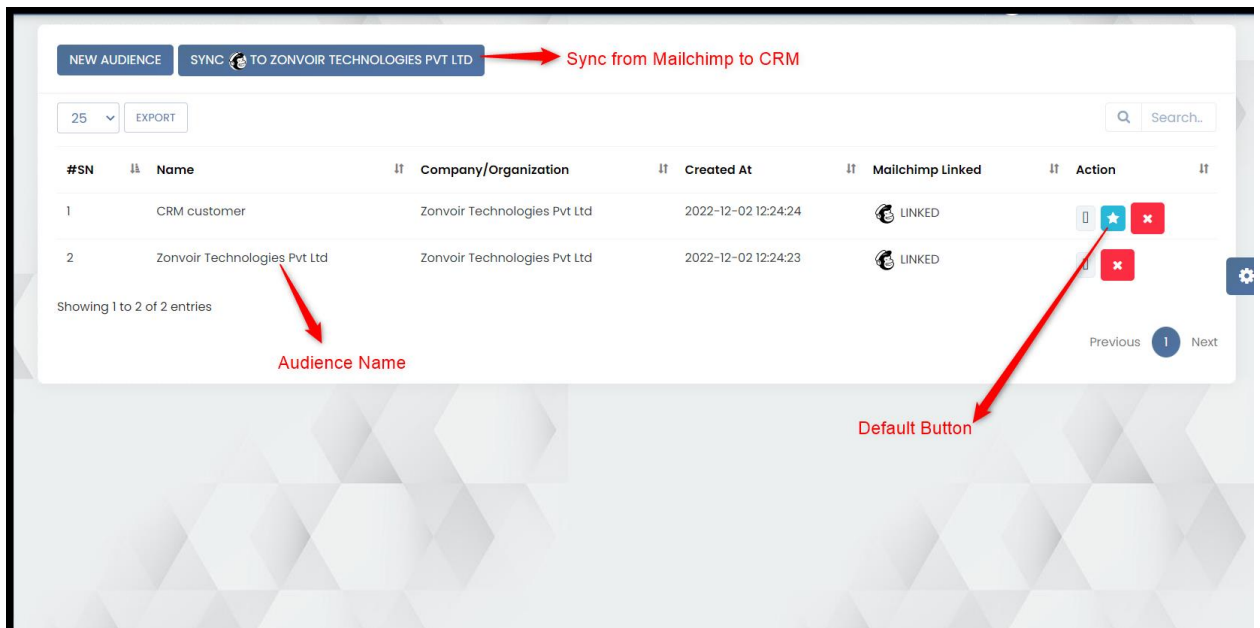
Clients/Contacts Sync Limit (ZONVOIR TECHNOLOGIES PVT LTD to MAILCHIMP) **Number of contact send from CRM to Mailchimp in one attempt**

50

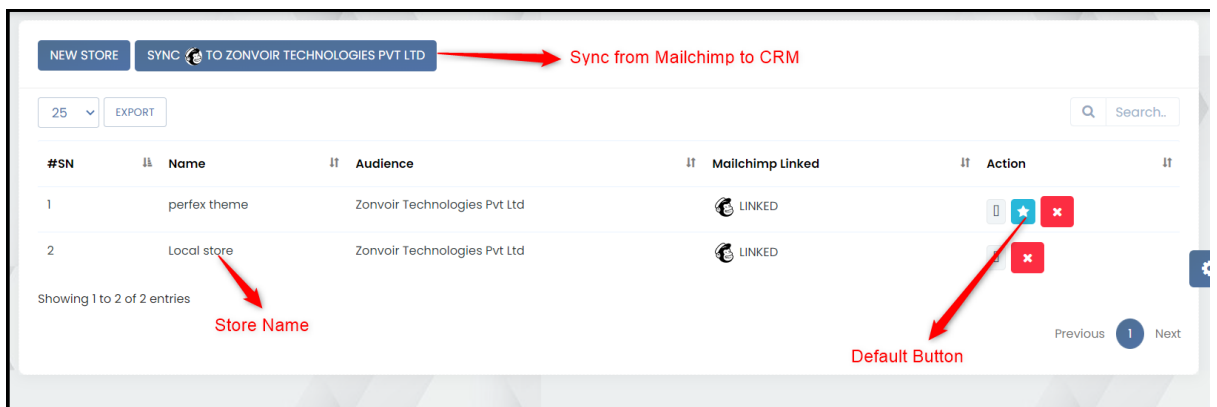
SAVE

- 2- **Mailchimp Audience:** Group of contact for sending Bulk email on mailchimp. One default audience should be selected in CRM to sync contacts and it can be added to multiple audiences later.

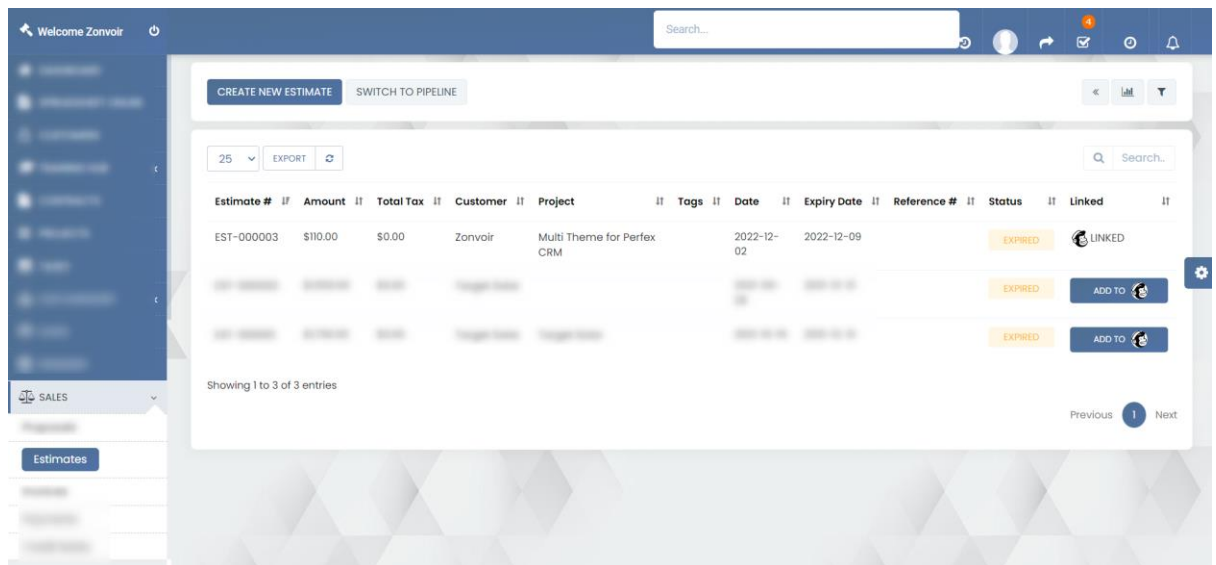
Setup → Mailchimp → Mailchimp Audience



- 3- Mailchimp Stores: Stores for sending estimates from CRM to Mailchimp. Estimate will be linked to default store in Mailchimp.
Setup → Mailchimp → Mailchimp stores

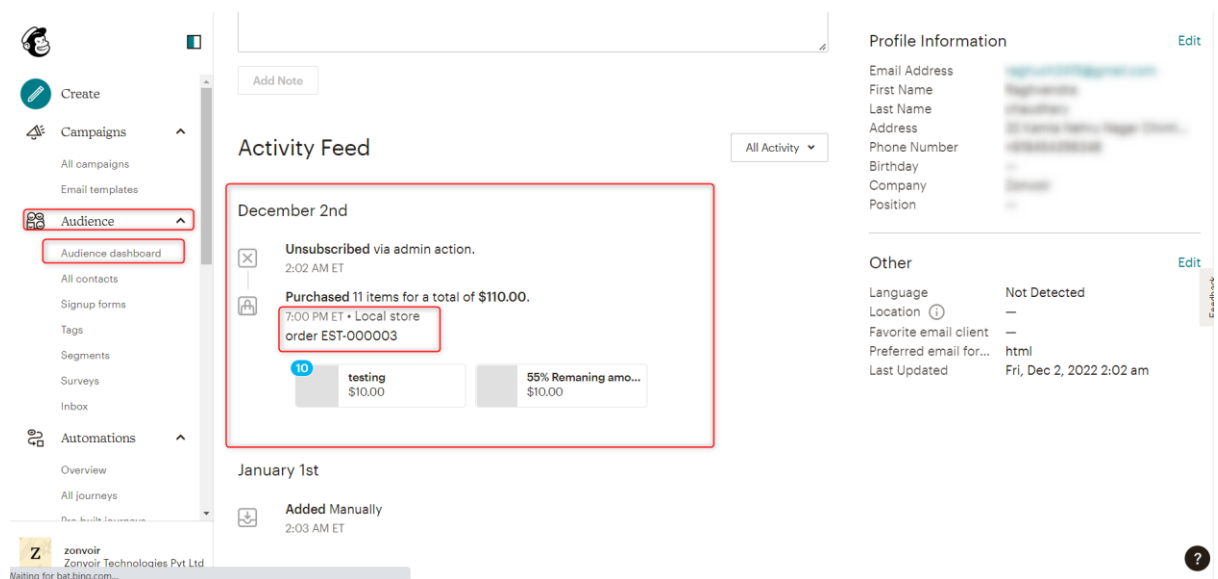


Create estimates
Goto Sales → Estimates



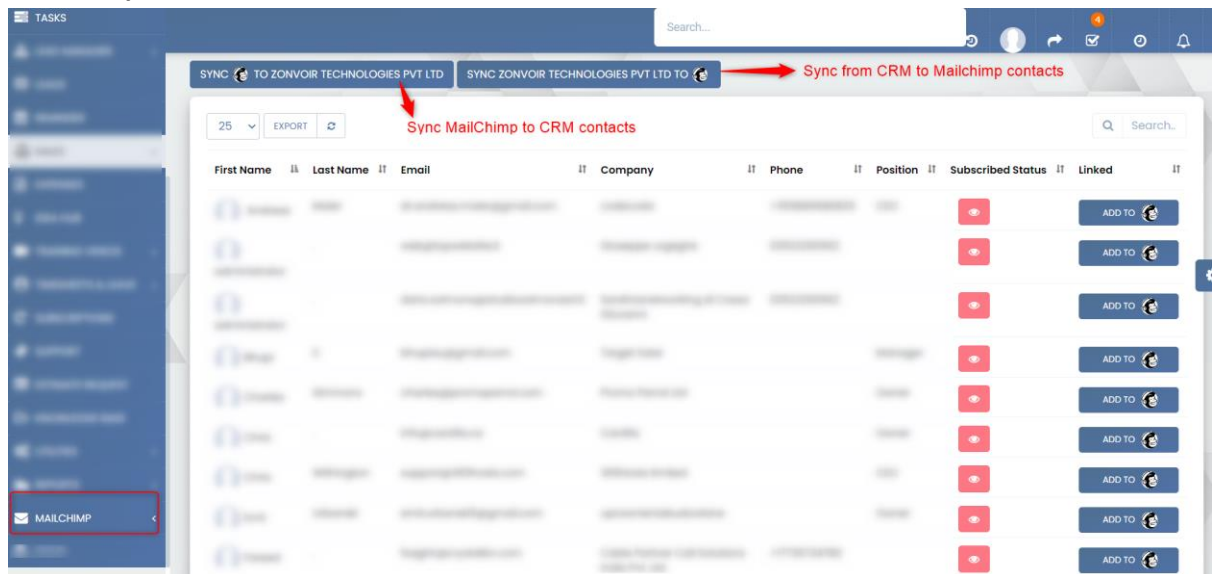
How to find Estimates in Mailchimp.

1- Login the mailchimp account → Audience → Audience Dashboard → View Contacts → Search contact email id in list → Click on contact email id

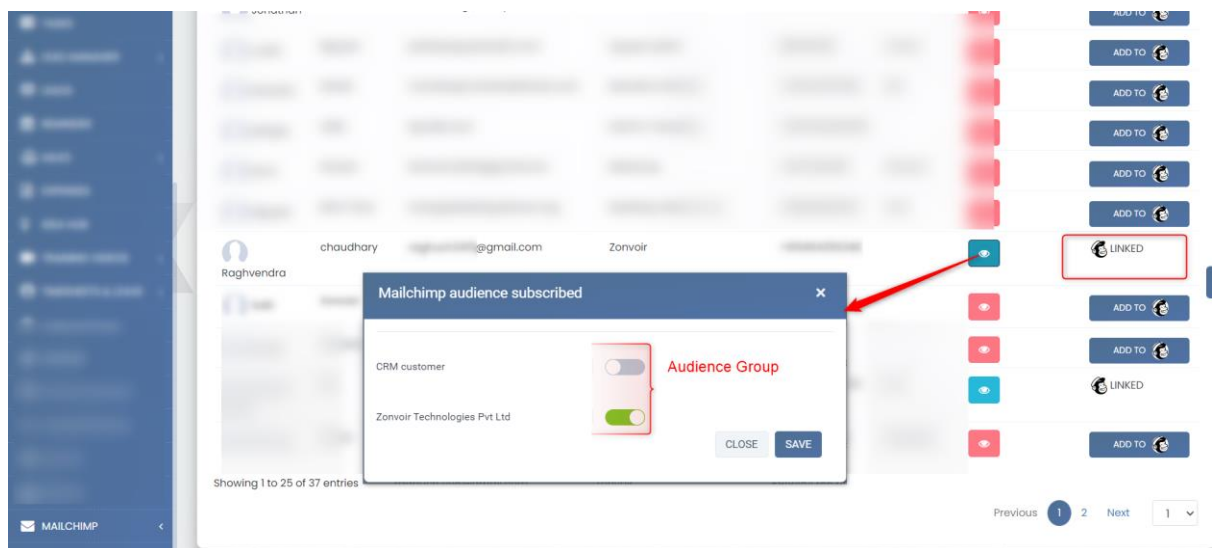


4- Contact

MailChimp → Contact.



Map contacts in mailchimp groups.



Staff Permission: Staff have customer permission then they can access the contacts under the mailchimp module

