


Mailchimp4Zoho Guide

Installation



Mailchimp4Zoho
Zoho Mailchimp Integration

Do you want to install the extension shared by steven@corephp.com?


Extension Details

Name	:	Mailchimp4Zoho
Version	:	17

I have agreed to the [Terms of Service](#).

Install

Agree to Terms of Service and click the “Install” button.



Mailchimp4Zoho
Zoho Mailchimp Integration


Choose Users/ Profiles

<input checked="" type="radio"/> Install for admins only
<input type="radio"/> Install for all users
<input type="radio"/> Choose profiles

[< Back](#)

Confirm

Choose usage profile and click “Confirm”.



Mailchimp4Zoho
Zoho Mailchimp Integration ✕

Your extension has been installed successfully.

Authorize the following Integrations to activate your extension.

Authorize

Skip

Click “Authorize”.



Connect Zoho to your account

Description

Username

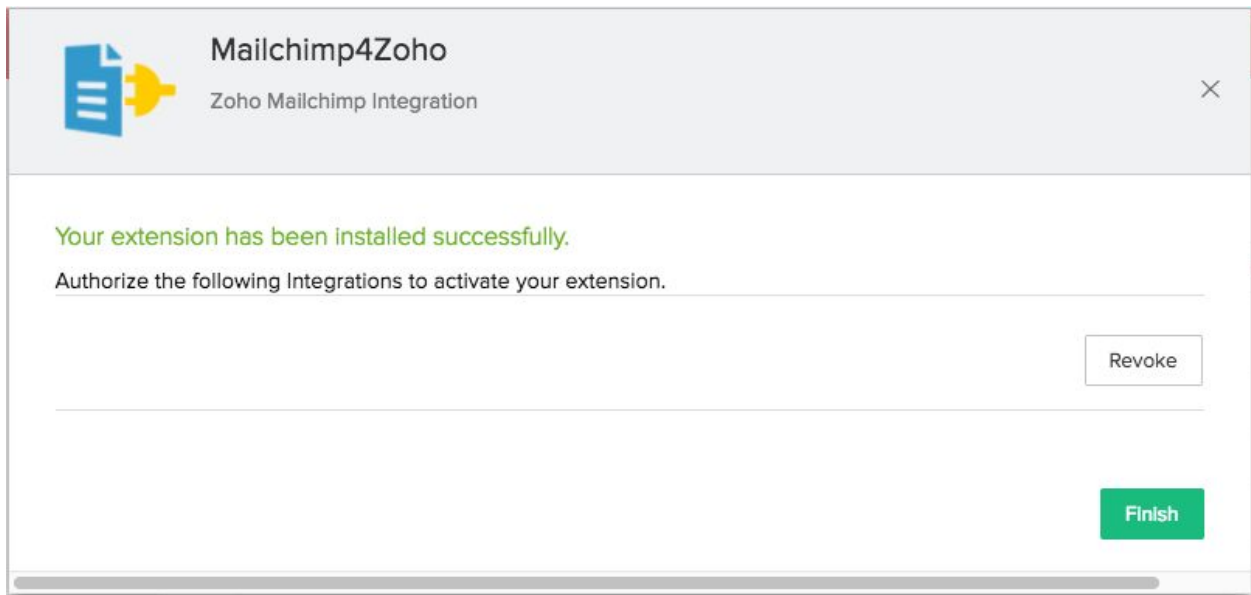
corephp

Password

.....

Log In

Connect your Mailchimp account to Zoho by login in with your Mailchimp user credentials.



Mailchimp4Zoho is installed. Click "Finish".

You will now be presented with the "Extension Details" screen. Scroll down to the "Data Center" parameter and enter your Mailchimp Datacenter.

Extension Settings

Data Center

us1

Hint: Your datacenter can be found by logging into www.mailchimp.com and looking at the URL:
<https://us1.admin.mailchimp.com/>

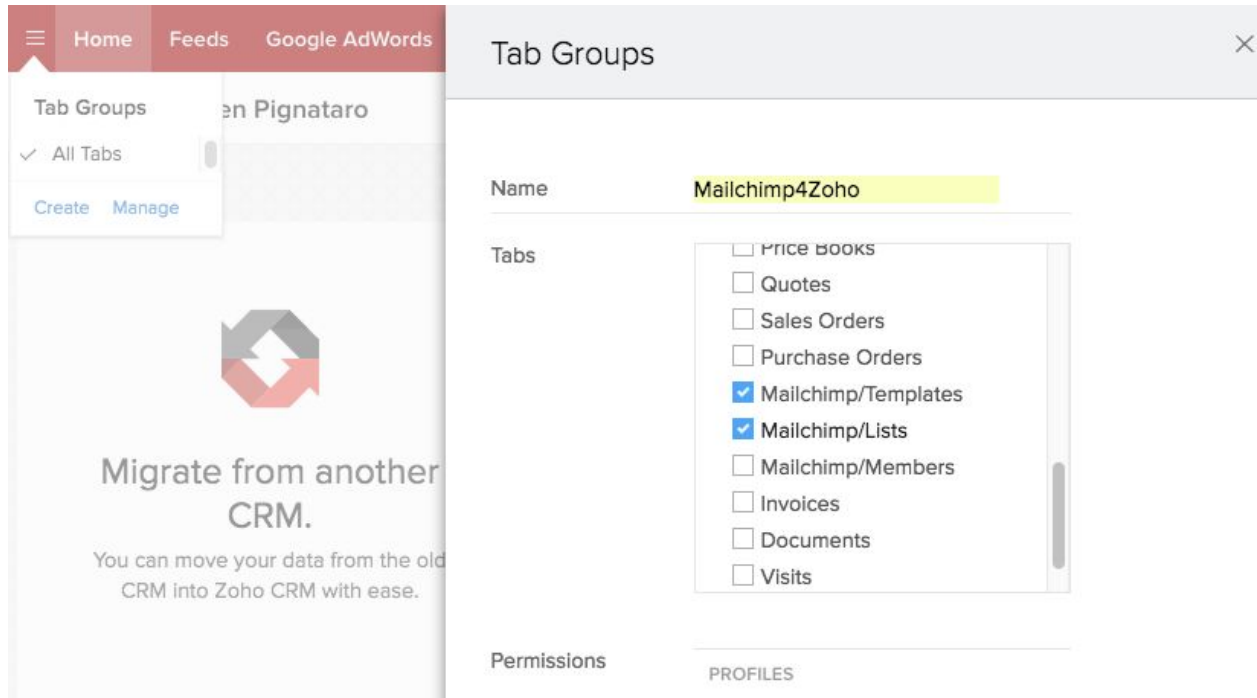
In this case the "Data Center" is "us1". Yours may be different, eg "us9".

Installation and Initial Configuration is now complete.

Setting up Tab Group

To access custom modules available M4Z you will need to set up a custom tab group in Zoho. Create this and select the following tabs that will be relevant to M4Z functionality:

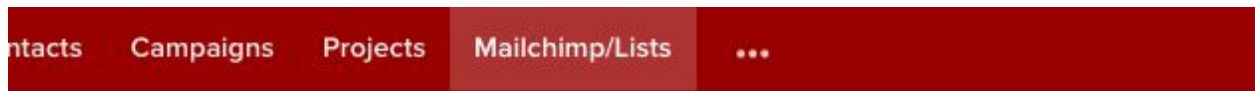
- Leads
- Contacts
- Campaigns
- Mailchimp/Templates
- Mailchimp/Lists



The screenshot shows the Zoho CRM interface. On the left, a navigation menu is open, showing 'Home', 'Feeds', and 'Google AdWords'. Below these, a 'Tab Groups' dropdown menu is visible, with 'All Tabs' selected and 'Create' and 'Manage' options. The main content area is titled 'Tab Groups' and shows a configuration for a tab group named 'Mailchimp4Zoho'. Under the 'Tabs' section, a list of modules is shown with checkboxes: Price Books, Quotes, Sales Orders, Purchase Orders, Mailchimp/Templates (checked), Mailchimp/Lists (checked), Mailchimp/Members, Invoices, Documents, and Visits. Below the tabs list, there is a 'Permissions' section with a 'PROFILES' dropdown.

Importing Mailchimp Lists

Click on the “Mailchimp/Lists” Tab and then click “Create Mailchimp/List”



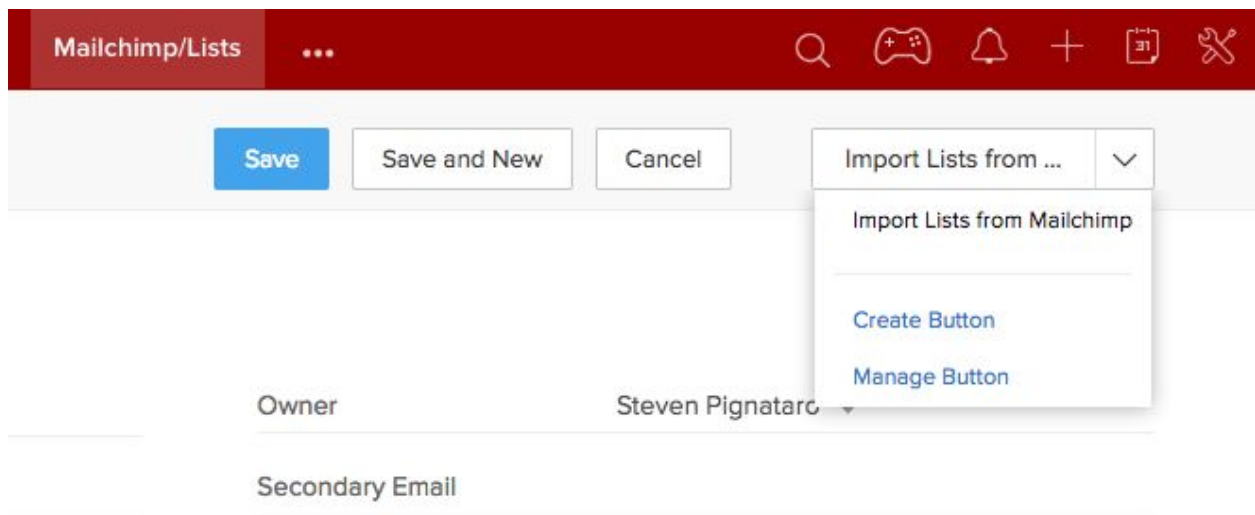
Create Mailchimp/Lists

Create and customize for your organization's needs.

Create Mailchimp/List

Import Mailchimp/Lists

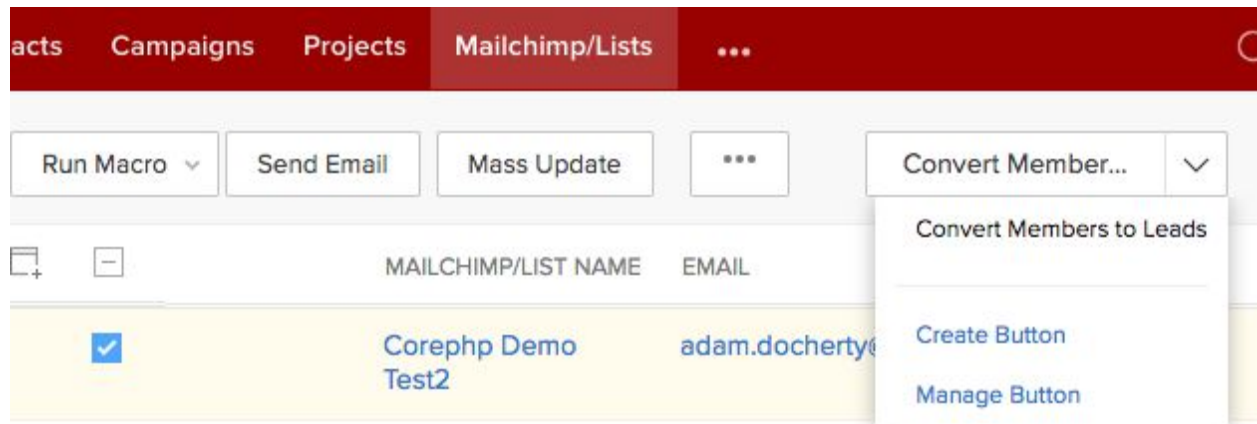
In the “Create Mailchimp/List” screen click on “Import Lists From Mailchimp” menu item (top left drop down menu). This can take some time so please be patient.



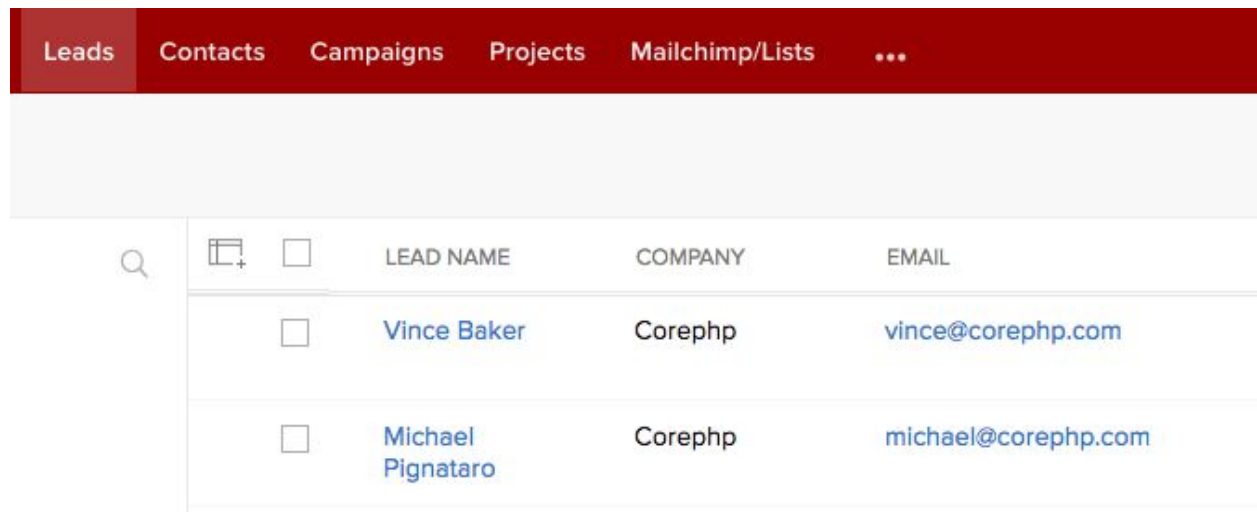
Now click on the “Mailchimp/Lists” tab and you will see your Mailchimp Lists have been imported to Zoho.

Converting Mailchimp List Members to Zoho Leads

Choose a Mailchimp List from the Lists you imported and click “Convert Members to Leads” (top left menu). Depending on the amount of members this can take some time, please be patient.



After the operation has completed you will see the members imported by clicking the “Leads” Tab.



Importing Mailchimp Templates

Note: Templates are created and edited on www.mailchimp.com in your Mailchimp admin account. When you create a template on Mailchimp you must re-import the templates to Zoho via the following. The Mailchimp4Zoho extension does not support editing or creating email templates on Zoho (for now).

Click on the “Mailchimp/Templates” Tab and then click “Create Mailchimp/Template”. Note this is identical to the process of importing Mailchimp/Lists so please refer to the “Importing Mailchimp Lists” instructions above.

Creating an Email Campaign

Click on the “Campaigns” tab and create a new Campaign. Please note: **DO NOT** fill in the following fields as they are used by the system:

- Mailchimp Campaign Sent
- Mailchimp Campaign ID
- Mailchimp List ID
- Mailchimp Batch ID

Most fields are self explanatory, note the Template field is related to the Templates you imported from Mailchimp. Once you have completed the fields save the campaign.

Now you must access the Campaign “View” Screen so that you can add your leads and/or contacts to your email campaign. You can do this by clicking on the “Campaigns” tab and then choosing the campaign you just created from the list of campaigns displayed.

Projects	Contacts	Campaigns	Mailchimp/Lists	...	
	<input type="checkbox"/>	CAMPAIGN NAME	TYPE	STATUS	START DATE
	<input type="checkbox"/>	Documentation Test	Email	Planning	

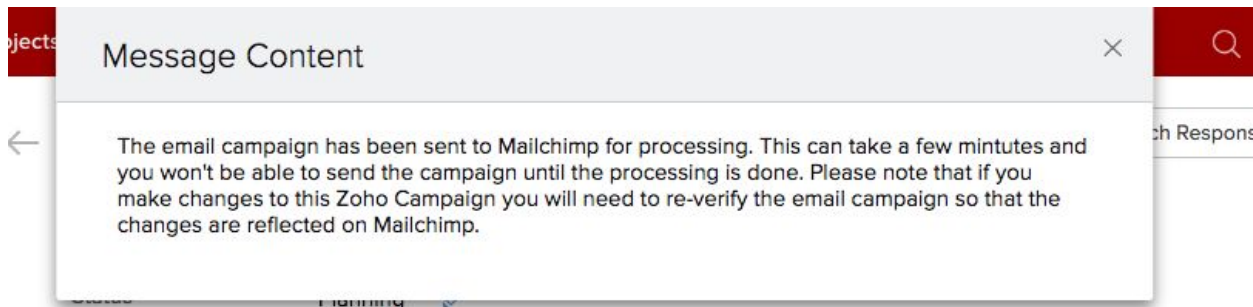
In the “View” screen scroll down until you reach the “Leads” and “Contacts” related list. Click on your desired adding functionality (New, Add Existing or Import) and add your Leads/Contacts to your campaign.

Projects	Contacts	Campaigns	Mailchimp/Lists	...
		Documentation Test		<input type="button" value="Edit"/>
<i>No records found</i>				
Leads				
<i>No records found</i> + New Add existing Leads Import My Leads Import My Organization Leads				

Once you have added some Leads/Contacts you are now ready to Verify your Email Campaign. Which you can do by clicking on the “Verify Email Campaign” drop down menu item (top left corner). Please be patient as this can take some time.



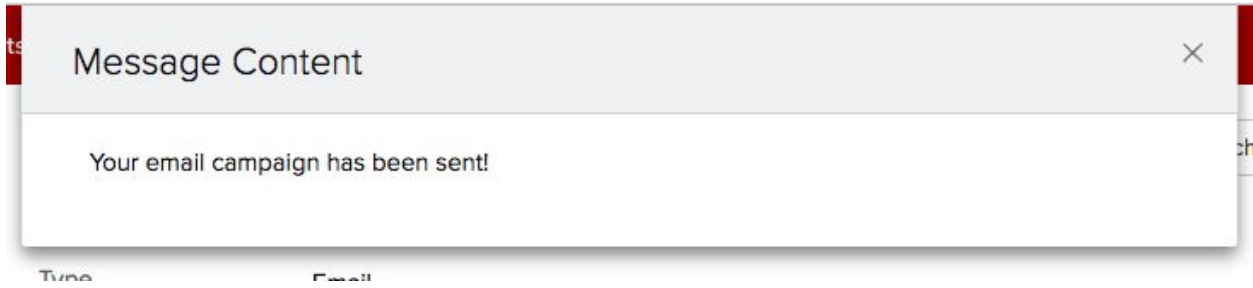
If you have missed required fields you will be notified. Also note that if you at this stage you want to make changes - eg you noticed you forgot something then you will have to re-verify your email campaign again. If all has gone well you will be presented with the following:



Now you are ready to send your email campaign. Note: You may be asking why we can't just send the campaign in one click? The reason behind this is that Mailchimp Batch processing takes some time to process and this means we cannot send the campaign out the the recipients instantly. If you click send and the processing has not finished you will be notified to try again after a few minutes. Sorry about this... we hope to have a solution in the near future to save this messing around! So after all that your email campaign should be ready to send now! Do so by clicking on the “Send Email Campaign” drop down menu item (top left corner).



If everything has gone according to plan you will be presented with the following:

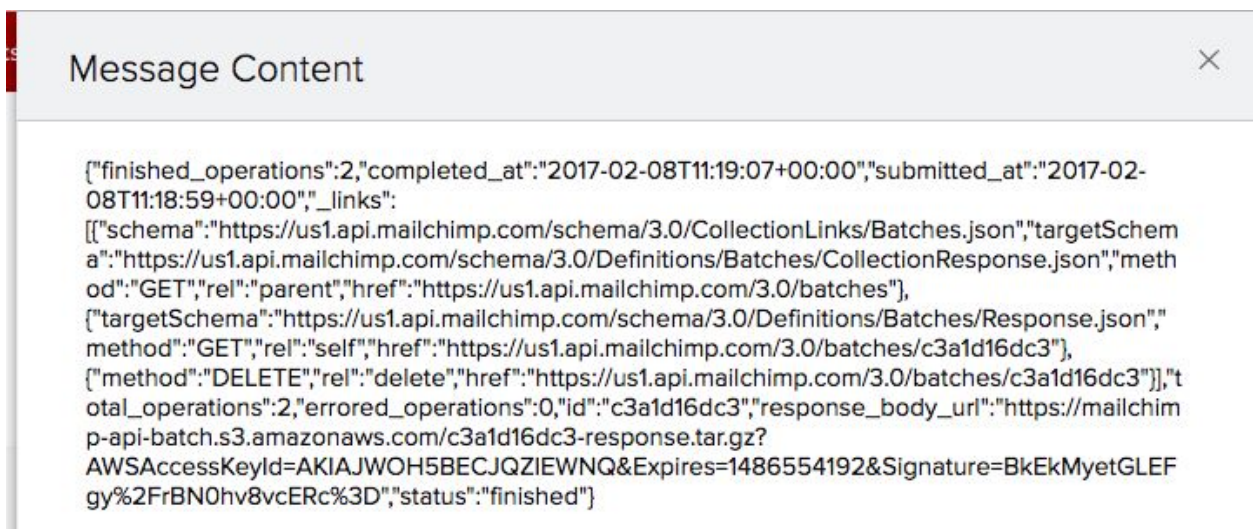


Please note that at any stage after “Verify Email Campaign” you can take a quick peek on Mailchimp.com and see your campaign and mailing lists. This can be handy when troubleshooting.

Also note that if you are having problems you can display the batch response - copy and paste it into an email and send it to us so that we can assist you!



This is what the response will look like, you can send this to us (please make sure you cut and paste the text as we need to copy the data).



TIP: Cloning a Campaign for Reuse

You can clone a campaign that has already been sent to save filling out the form data again. To do this you must be sure to clear the following fields of the new(copied) campaign:

- Mailchimp Campaign Sent
- Mailchimp Campaign ID
- Mailchimp List ID
- Mailchimp Batch ID