

MailChimp for Salesforce Installation Guide

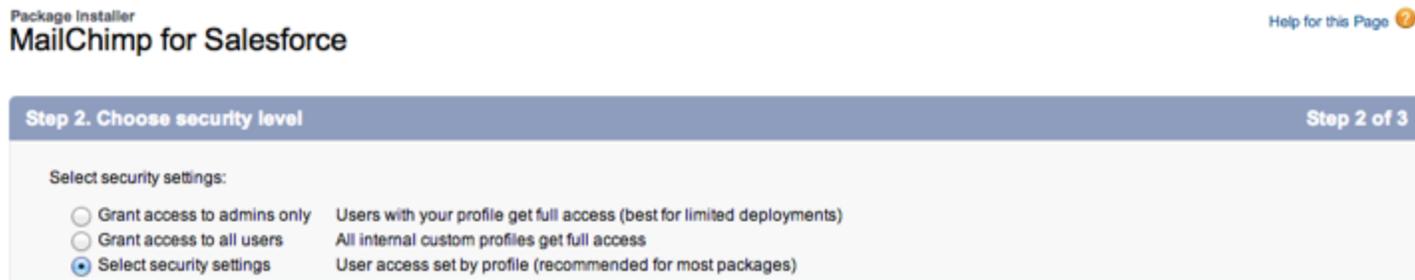
The most recent version is available at our AppExchange listing:

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B3byfEAB>

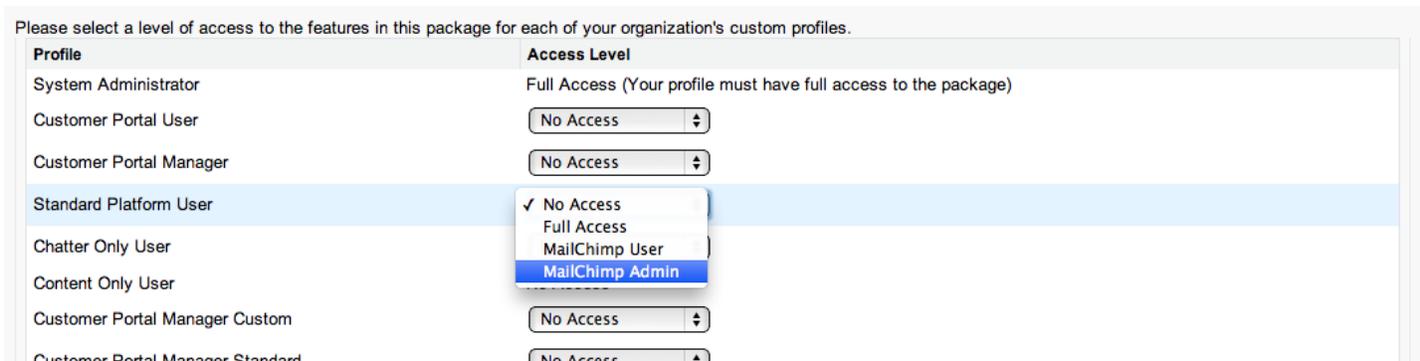
Install Steps:

Begin installation by logging into Salesforce Org and copying the above link into your browser. The following steps expand on the information provided in the Install Wizard.

1. When prompted, review package components and press Continue button at the bottom of the page.
2. Grant desired third party access and press Continue. (There is one access record per MailChimp data center.)
3. Move through Installation Wizard
4. On Step 2/Choose Security Level. Enterprise and Unlimited Edition users can select the “Select Security Settings” radio button in order to set each profile’s level of access. We have included two levels of access which should cover most cases.



5. After selecting the radio button, scroll down to select the desired level of access by profile



NOTE: Only use these steps to add permission settings to custom profiles. Standard profiles will not accept these profile setting and the current version will not display an error message even

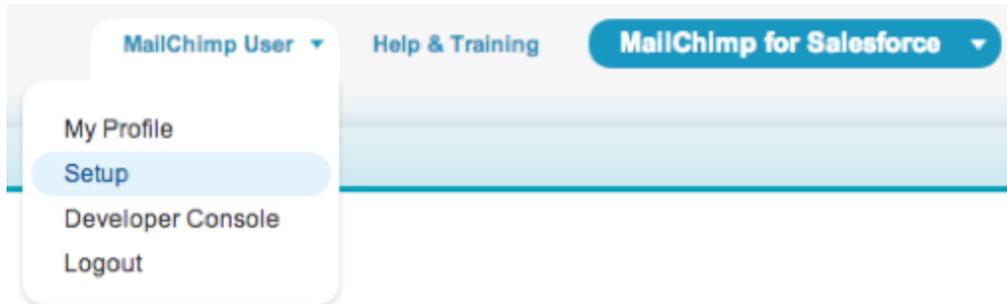
though these settings are not applied. Instructions to add permission sets to profiles are covered at the end of the Modify Salesforce Configuration portion of this document.

6. Continue through wizard and complete install process

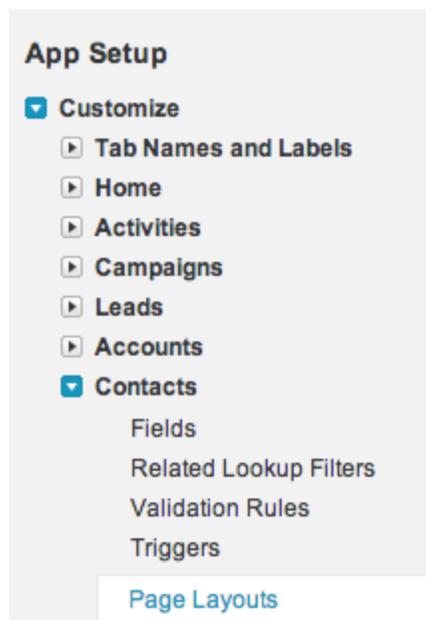
Modify Salesforce Configuration

Modify Contacts

1. Click the Salesforce login name displayed in the upper right side of the page.



2. Select 'Setup' option from the drawer of options.
3. On the Setup page, locate the Customize option in the left column and click the arrow next to Customize to reveal available customization options.
4. Select the arrow next to Contacts to open the contact options.
5. Click Page Layouts from the contacts drop-down to open the layout designer.



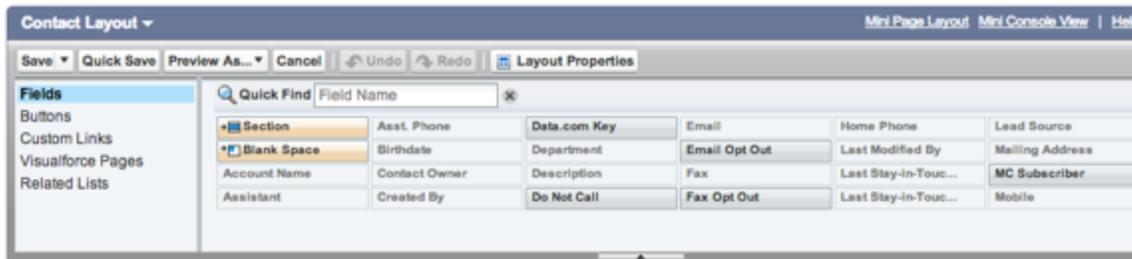
6. Opt to edit the contact layout with the edit link under the Action heading in the

layouts table.

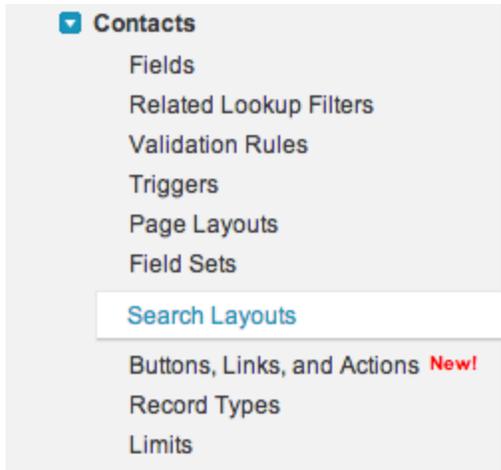
7. In the layout designer, click Visualforce pages in the left side of the header options.



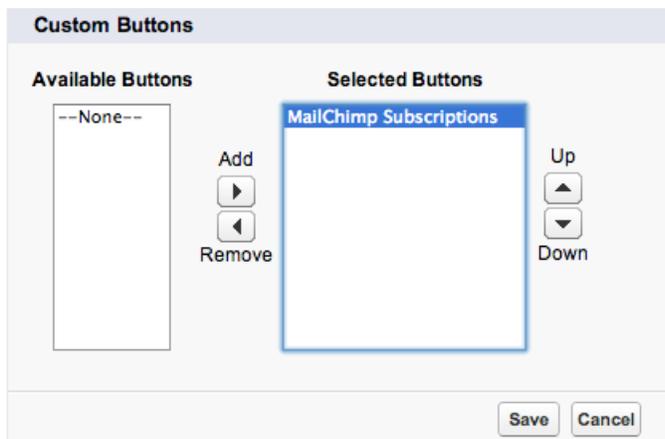
8. Grab the MembershipContact section and drag it onto the page layout into the description area (or any other 1 column section of your choice)
9. Once contact is added to the contact layout, go back to the layout designer and click Fields.
10. Select the MC Subscriber field and drag it and drop it onto the page layout. (REQUIRED for PE and GE orgs)



11. Click Save in the designer.
12. Going back to the navigation to the far left of the page, select Search Layouts.



13. Click edit next to Contacts List View
14. Move “MailChimp Subscriptions” to the selected buttons area by selecting the MailChimp Subscriptions head and clicking the ‘>’ button.



15. Save

Modify Lead

1. Click the Salesforce login name displayed in the upper right side of the page.
2. In the left column, click the down arrow next to Customize.
3. Select Leads from the list.
4. Open the Page Layouts option.
5. In the Lead Page Layout click ‘edit’ link.
6. In the layout designer, click Visualforce pages in the left side of the header options.
7. Grab the MembershipContact section and drag it onto the page layout into the description area
8. Scroll up to the layout designer click Fields under the open Leads option.
9. Select the MC Subscriber field and drag it and drop it onto the page layout. (REQUIRED for PE and GE orgs)
10. Click Save

11. Back in the far left navigation, select Search layouts from the Leads dropdown.
12. Click edit next to Lead List View
13. In the Leads List View, move “MailChimp Subscriptions” to the selected buttons area and click save
14. This app can be set to create Leads from MailChimp data. While we are here, this is a good time to check your Lead configuration:
 - a. Are your Lead assignment rules set up to handle new leads from MailChimp? The Lead Source will be defaulted to “MailChimp”
 - b. EE and UE only - Have you defined a Lead Process? (Lead Assignment rules only work when at least one Lead Process has been defined.)

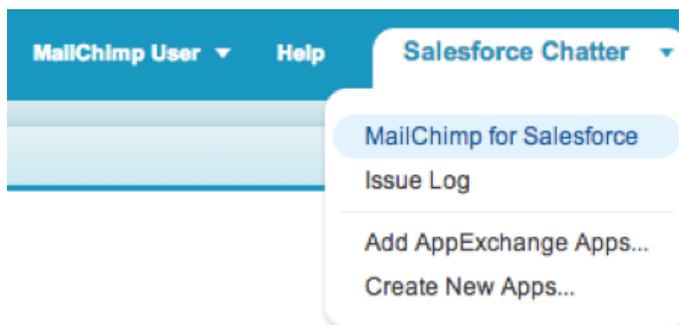
Add Permission Sets to Users - UE, EE, PE and GE orgs

1. Click the Salesforce login name displayed in the upper right side of the page.
2. In the left column, scroll to Manage Users and click Users from the Manage Users menu.
3. Select your user by clicking edit next to the user name
4. On the user page, scroll to the Permission Set Assignment section
5. Move either MailChimp Admin or MailChimp User to the Enabled Permission set section and click save

Turn On the Hourly Sync

Please follow the directions carefully below.

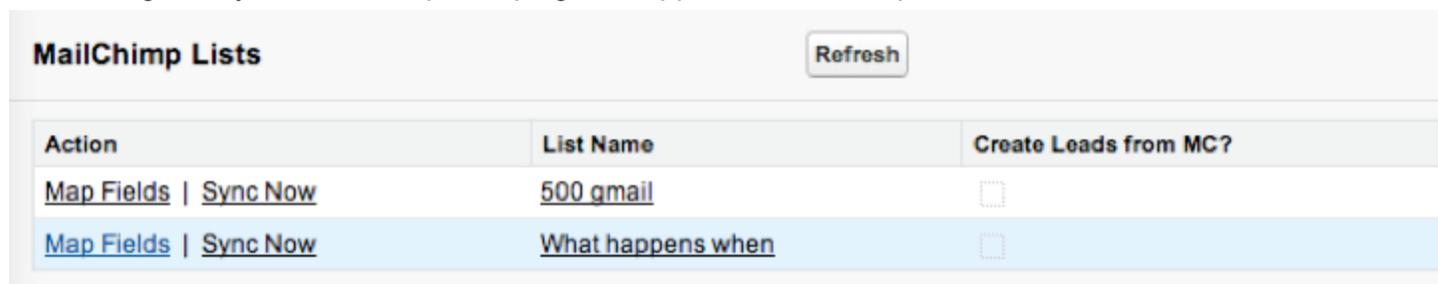
1. Return to MCSetup Page by clicking on Blue Oval in Upper Right hand corner



2. Select MailChimp for Salesforce
3. Navigate to MC Setup Tab
4. Login using your MailChimp credentials (The login will only be available to users with MailChimp Admin permissions.)
5. Assuming a successful login you will begin the MailChimp Setup wizard. NOTE: Your progress through this wizard will be saved by selecting “Come Back Later” at any time.
6. On Step 1 indicate whether you want to create Leads from MailChimp data **during the initial upload** of MailChimp Subscribers. This can be a large number of Leads. Please

be sure your Lead configuration is set up appropriately(e.g. you probably want to turn off any auto-response rules.) One Lead will be created for each email address that exists in MailChimp, but does not exist in Salesforce.

7. Step 2 of the Setup wizard will iterate through the field mappings for each of your MailChimp Lists. **The application works best when fields are mapped between the two systems. When fields are mapped, it means changes in Salesforce data will be copied over to MailChimp. It also means that data from MailChimp will be used whenever new email addresses are detected from MailChimp and Leads are created.**
 - a. Select Contact fields
 - b. Select Lead fields
 - c. If necessary, create new fields in MailChimp on each Mapping page.
 - d. Click Save and repeat for all lists.
8. After mapping fields for all lists you will be returned to the Setup tab and the MailChimp Lists portion of the page should now have all of your lists displayed. It may take a little longer for your MailChimp Campaigns to appear on the Setup tab.



Action	List Name	Create Leads from MC?
Map Fields Sync Now	500 gmail	<input type="checkbox"/>
Map Fields Sync Now	What happens when	<input type="checkbox"/>

9. Turn on the hourly sync by selecting “Turn On Hourly Sync” button on Setup page.
10. You’re live now!

Within an hour, a background process that uploads MailChimp data will start. The hourly synch button on the MC Setup page will display ‘Turn Off Hourly Synch’ if everything has been properly setup. Checking the button text is an easy way to ensure that everything is running properly.

Note that the initial upload can take several hours if you have large MailChimp Lists. You can always check the Batch Apex scheduling to ensure that things are working properly. Batch Apex can be found in Salesforce by following these steps: Setup>Monitoring>Scheduled Jobs - you should see “MailChimp Hourly Sync” and the next scheduled run time

Now that you are live, here’s what you can do:

- Upload email addresses to MailChimp from lead and contact list views
- Create, run and schedule custom queries to populate mailing lists with Leads, Contacts and Campaign Members
- See Subscriber detail and full activity by clicking the View More links

- You can individually manage Subscriber preferences from Contact and Lead page layouts
- You can see MailChimp Campaign details
- If you turned Lead creation on, new MailChimp Subscribers will become new Salesforce Leads
- You can report on all of it, because the data is now in Salesforce

Other important notes:

If you get trigger happy and start clicking Sync Now or Update Stats, everything will be just fine but you may get a warning to indicate that a batch process is already in progress if you start clicking too fast

If you are concerned about a potential influx of Leads from the initial upload, but would like new MailChimp Subscribers to show up in Salesforce, you'll want to change the create Lead settings **after** the initial upload is complete:

1. Make sure you gave the initial synch adequate time to run.
2. Click the Edit button next to MailChimp Settings
3. Check the "Allow MailChimp to create Leads in Salesforce?" box
4. For each List, check the "Create Leads from MC?" box
5. Click Save