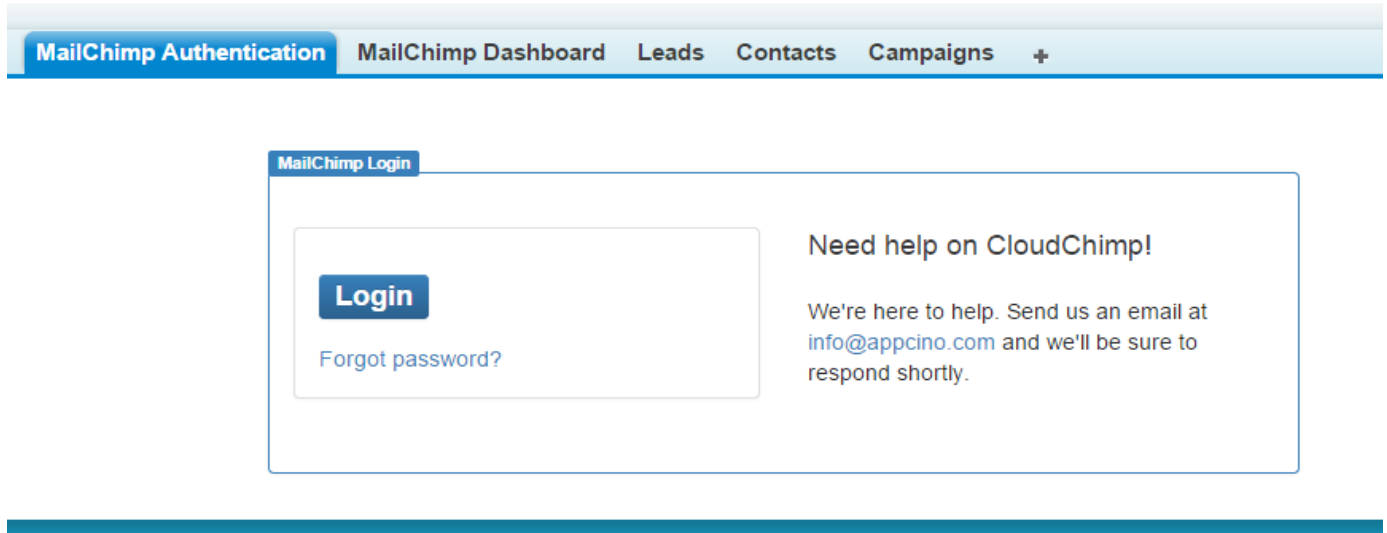


CloudChimp Application - User Guide



1) Authentication

Click on “Login” button to login with MailChimp.



2) MailChimp Dashboard

MailChimp Dashboard allows you to manage MailChimp lists and templates.

Home	Getting Started	MailChimp Authentication	MailChimp Dashboard	Leads	Contacts	Campaigns	+
------	-----------------	--------------------------	---------------------	-------	----------	-----------	---

Activated	MailChimp Lists						Hourly Sync Settings ↻
Action	Name	Sync Status	#Unmapped Fields	#Synced Contacts	#Synced Leads	#Subscribers	#Segments
⚙ 👤 ⌚ ⌕ +	Delhi clients	Synced	1	5	0	5	2
⚙ 👤 ⌚ ⌕ +	Jaipur Clients	Synced	0	4	0	4	0

⏪ | ⏩ 1-2 of 2

Delhi clients - Segments		
Name	#Subscribers(Contact)	#Subscribers(Lead)
Clients from Appcino	4	0
Clients from Gmail	1	0

3) MailChimp Lists

Here every row in the table consists of actions that can be performed, name of lists, status of the list, count of fields that haven't yet been mapped, subscribers and synced leads and contacts. To find out what a list is composed of click on its name. For comprehension, place your mouse's cursor on each symbol under the 'Action' column, from left to right, to view their names, while following their functions as mentioned below.

a. Map Field: Maps MailChimp subscribers' fields with that of Salesforce contacts and leads.

Field Mapping

MailChimp Field	Salesforce Contact Field	Salesforce Lead Field
DOB	--None--	--None--
Email Address	Email(Default)	Email(Default)
First Name	First Name	First Name
Last Name	Last Name	Last Name
Add New Field	Text	Enter Field Name Add Field

b. Add Subscriber: Adds multiple Salesforce contacts and leads into lists, which can be further synced with MailChimp.

Add Subscribers

List - Delhi clients ☒ Contact ☐ Lead

Specify Filter Criteria For Contact

	Field	Operator	Value
1	--None--	--None--	
2	--None--	--None--	
3	--None--	--None--	
4	--None--	--None--	
5	--None--	--None--	

Advanced Filter Condition [Help](#)

c. Sync Subscriber From Mailchimp : Loads MailChimp List subscribers in Salesforce as contacts or leads.

Home Getting Started MailChimp Authentication **MailChimp Dashboard** Leads Contacts Campaigns +

Activated

MailChimp Lists

Hourly Sync Settings | ↺

Action	Name	Sync Status	#Unsynced Fields	#Synced Contacts	#Synced Leads	#Subscribers	#Segments
⌕ 👤 ⌚ ⌕ +	Delhi clients					5	2
⌕ 👤 ⌚ ⌕ +	Jaipur Clients					4	0

Delhi clients - Segments

Name	#Subscribers(Contact)	#Subscribers(Lead)
Clients from Appcino	4	0
Clients from Gmail	1	0

Choose Option

How would you like to create your MailChimp subscribers in salesforce?

As Contacts As Leads

d. Sync Subscriber In MailChimp: Sends Salesforce contacts and leads to MailChimp, which haven't been synced yet.

e. Add Segment: Defines segment criteria, as a part of a list, for targeted campaign subscribers.

Specify Filter Criteria For Segment

Field	Operator	Value	
Email Address	not equal to		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Preview Cancel

Contacts

First Name	Last Name	Email Address
Nilesh	Raman	nileshr@appcino.com

f. View Segment: As the name suggests, it generates full view of segment details.

Activated

MailChimp Lists Hourly Sync Settings | ↻

Action	Name	Sync Status	#Unmapped Fields	#Synced Contacts	#Synced Leads	#Subscribers	#Segments
⚙️ 👤 ⌚ 🔄 +	Delhi clients	Synced	1	5	0	5	2
⚙️ 👤 ⌚ 🔄 +	Jaipur Clients	Synced	0	4	0	4	0

⏪ | ⏩ 1-2 of 2

Delhi clients - Segments

Name	#Subscribers(Contact)	#Subscribers(Lead)
Clients from Appcino	4	0
Clients from Gmail	1	0

g. Hourly Sync: Activates hourly sync of MailChimp Subscribers and Salesforce Contacts and Leads, for up to five lists.

Home Getting Started MailChimp Authentication MailChimp Dashboard Leads Contacts Campaigns +

Activated

MailChimp Lists Hourly Sync Settings | ↻

Action	Name	Sync Status	#Unmapped Fields	#Synced Contacts	#Synced Leads	#Subscribers	#Segments
⚙️ 👤 ⌚ 🔄 +	Delhi clients					5	2
⚙️ 👤 ⌚ 🔄 +	Jaipur Clients					4	0

Hourly Sync Settings

How would you like to create your MailChimp subscribers in salesforce?

☒ As Lead ☐ As Contact

* Maximum 5 MailChimp lists can be selected for hourly sync.

Delhi clients
Jaipur Clients

Turn on Hourly Sync

Templates

Action	Name	Active
📄 🔄 +	Delhi clients	✓
📄 🔄 +	Jaipur Clients	✓

⏪ | ⏩ 1-2 of 2

4) Templates

Templates are meant to be used in a regular campaign. Same as mentioned above, place you mouse's cursor on each symbol from left to right to view their names and get idea of their functions.

Templates			
Action	Name	Date Created	Active
  	asdfighklj	2015-06-04 18:16:55	☒
  	Demo Template	2015-04-24 14:10:28	☒
  	Test Template	2015-05-19 15:49:39	☒

a. Create Template: Creates new template.

[Home](#) [Getting Started](#) [MailChimp Authentication](#) [MailChimp Dashboard](#) [Contacts](#) [Leads](#) [Campaigns](#) [+](#)

Add New Template

Template Name

Merge Variable(s)

--None--

--None--

Template Body

b. View Template: Generates view for template details.

The screenshot shows the 'View Template - Demo Template' page. At the top, there is a navigation bar with links: Home, Getting Started, MailChimp Authentication, MailChimp Dashboard (active), Contacts, Leads, and Campaigns. Below the navigation bar, the page title is 'View Template - Demo Template'. The main content area contains the following fields:

- Template Name:** A text input field containing 'Demo Template'.
- Merge Variable(s):** Two dropdown menus, both set to '--None--', followed by an empty text input field.
- Active:** A checkbox that is checked.
- Template Body:** A rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, and outdent. The text area contains the following content:
Demo Template

Hi '{FNAME}'

Template is pretty cool feature of this app.

Thanks,
force Mailchimp

At the bottom right of the page, there are two buttons: 'Edit' and 'Cancel', which are highlighted with a red rectangular box.

c. Edit Template: From the interface projected above, you can click edit to edit the template.

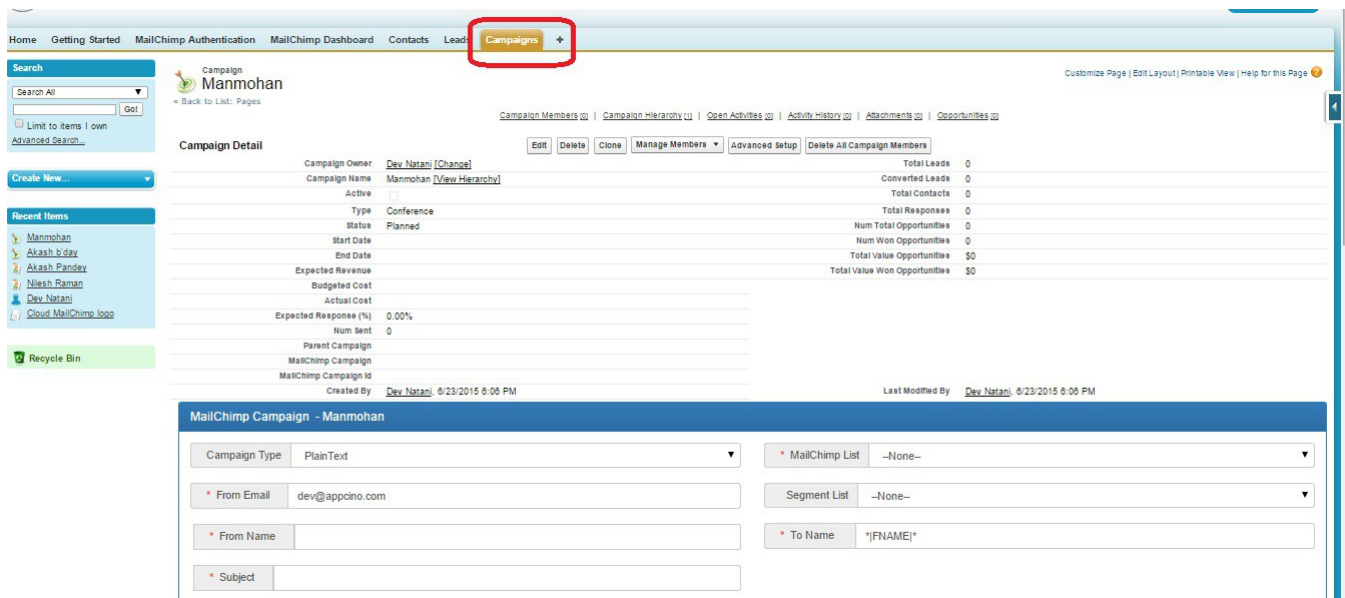
The screenshot shows the 'Edit Template - Demo Template' page. The layout is identical to the 'View Template' page, but the 'Edit' button is no longer visible. Instead, at the bottom right, there are three buttons: 'Save', 'Save And Sync', and 'Cancel'.

d. Delete Template: Deletes template from Salesforce but not from MailChimp.

e. Delete Template from MailChimp: Deletes template from both Salesforce and MailChimp.

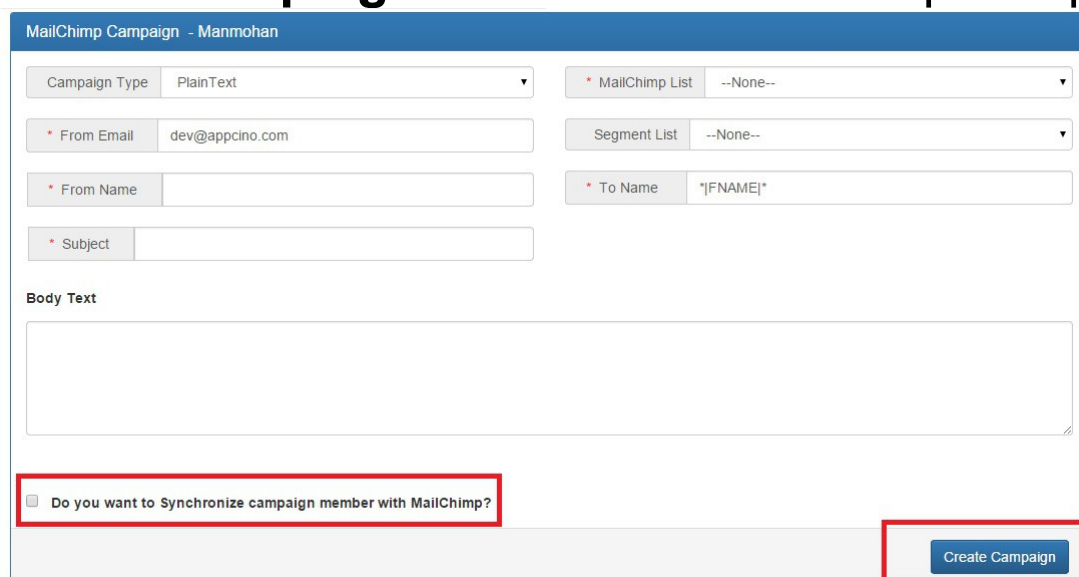
5) Campaign

The campaign section allows you to access the following functionality.



The screenshot shows the Salesforce interface for the MailChimp Campaigns section. The 'Campaigns' tab is highlighted in the top navigation bar. The left sidebar contains a search bar, a 'Create New...' button, and a 'Recent Items' list. The main content area displays the 'Campaign Detail' for a campaign named 'Manmohan'. The detail includes fields for Campaign Owner, Campaign Name, Active status, Type, Status, Start Date, End Date, Expected Revenue, Budgeted Cost, Actual Cost, Expected Response (%), Num Sent, Parent Campaign, MailChimp Campaign, and MailChimp Campaign ID. A table on the right shows various statistics: Total Leads, Converted Leads, Total Contacts, Total Responses, Num Total Opportunities, Num Won Opportunities, Total Value Opportunities, and Total Value Won Opportunities. Below the campaign details, there is a 'MailChimp Campaign - Manmohan' section with fields for Campaign Type, MailChimp List, From Email, Segment List, From Name, To Name, and Subject. The 'From Email' field is populated with 'dev@appcino.com'.

a. Create Campaign: Creates a MailChimp campaign.



The screenshot shows the 'Create Campaign' form in MailChimp. The form is titled 'MailChimp Campaign - Manmohan'. It includes fields for Campaign Type, MailChimp List, From Email, Segment List, From Name, To Name, and Subject. The 'From Email' field is populated with 'dev@appcino.com'. Below these fields is a 'Body Text' section with a large text area. At the bottom of the form, there is a checkbox labeled 'Do you want to Synchronize campaign member with MailChimp?'. The 'Create Campaign' button is located at the bottom right of the form.

b. Sync Campaign Members: From the interface projected above, you can sync campaign members with MailChimp as well.

c. Update Campaign: Updates all the fields except Campaign Type and saves changes on MailChimp.

MailChimp Campaign - Akash b'day

Campaign Type	plaintext	MailChimp List	Delhi clients
From Name	Invitation	Segment List	--None--
From Email	dev@appcino.com	To Name	*[FNAME]*
Subject	Akash B'day		

Field Name	Merge Field
Email Address	*[EMAIL]*
First Name	*[FNAME]*
Last Name	*[LNAME]*
DOB	*[DOB]*

Body Text

Hello Mr. *[LNAME]* ,

We are inviting you to Akash's birthday party.

Create Date: 06/23/2015

[Update Campaign](#) [Send Campaign](#)

d. Send Campaign: From the interface projected above, you can send the campaign as well. After clicking on send you will see the following. Show Report button elaborates on entire campaign.

MailChimp Campaign - Akash b'day

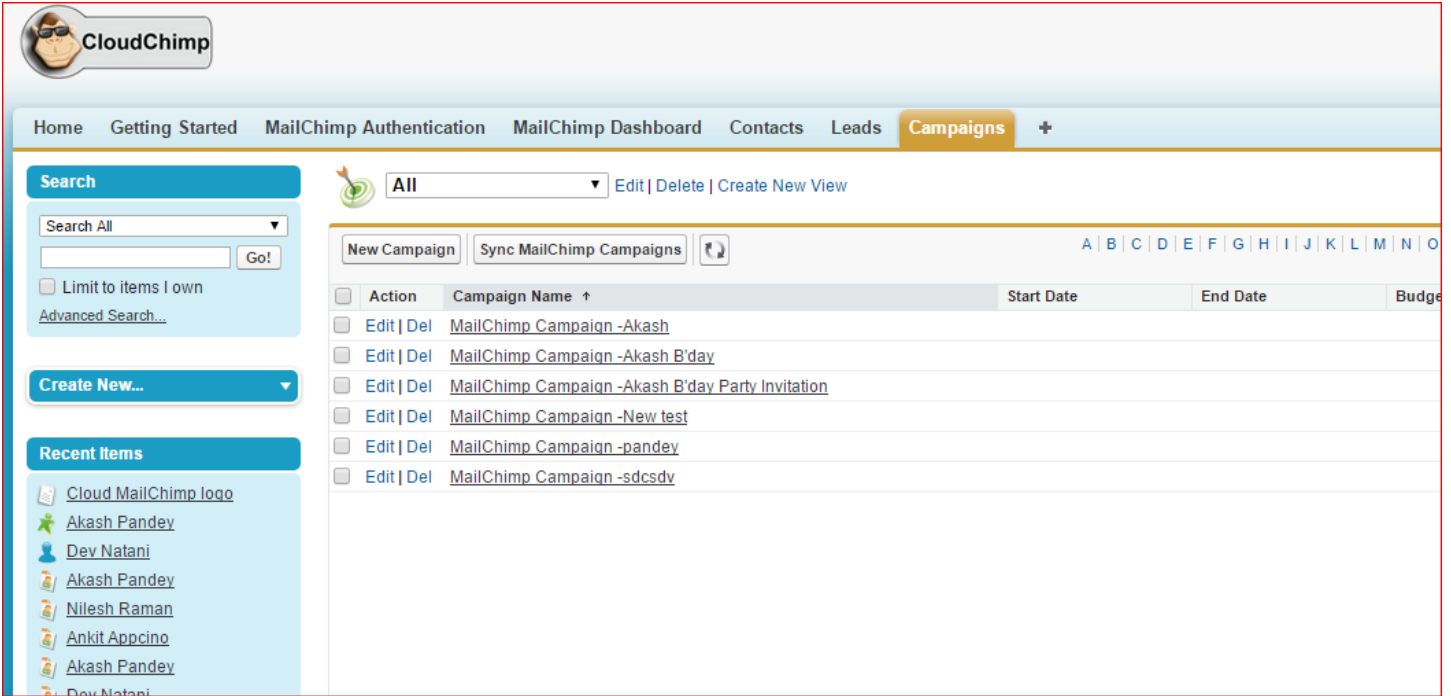
Campaign Subject	Akash B'day	Create Date	06/23/2015
Sent Date	06/23/2015	From Email	dev@appcino.com
Campaign Status	Sent	MailChimp List	Delhi clients
Campaign Type	plaintext	From Name	Invitation

[Show Report](#)

0 Opened	0 Clicked	0 Bounced	0 Unsubscribed
-------------	--------------	--------------	-------------------

Successful deliveries	6	100.0%	Clicks per unique opens	0%
Total opens	0		Total clicks	0
Last opened	N/A		Last clicked	N/A
Forwarded	0		Abuse reports	0

e. Sync MailChimp Campaign: Synchronizes MailChimp campaign to Salesforce



The screenshot displays the CloudChimp web application interface. At the top, there is a navigation bar with links: Home, Getting Started, MailChimp Authentication, MailChimp Dashboard, Contacts, Leads, and Campaigns (which is currently selected). Below the navigation bar, the main content area is divided into a left sidebar and a main panel. The sidebar contains a search box, a 'Create New...' button, and a 'Recent Items' list. The main panel shows a table of campaigns under the 'All' view. The table has columns for Action, Campaign Name, Start Date, End Date, and Budget. The table lists several campaigns, including 'MailChimp Campaign -Akash', 'MailChimp Campaign -Akash B'day', 'MailChimp Campaign -Akash B'day Party Invitation', 'MailChimp Campaign -New test', 'MailChimp Campaign -pandev', and 'MailChimp Campaign -sdcsdv'.

CloudChimp

Home Getting Started MailChimp Authentication MailChimp Dashboard Contacts Leads **Campaigns** +

Search

Search All Go! [Advanced Search...](#)

Create New...

Recent Items

- Cloud MailChimp logo
- Akash Pandey
- Dev Natani
- Akash Pandey
- Nilesh Raman
- Ankit Appcino
- Akash Pandey
- Dev Natani

Campaigns

All [Edit](#) | [Delete](#) | [Create New View](#)

New Campaign **Sync MailChimp Campaigns** [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#)

☐	Action	Campaign Name ↑	Start Date	End Date	Budget
☐	Edit Del	MailChimp Campaign -Akash			
☐	Edit Del	MailChimp Campaign -Akash B'day			
☐	Edit Del	MailChimp Campaign -Akash B'day Party Invitation			
☐	Edit Del	MailChimp Campaign -New test			
☐	Edit Del	MailChimp Campaign -pandev			
☐	Edit Del	MailChimp Campaign -sdcsdv			

6) Contacts and Leads

Interface and functionality for contact and detail are identical.

Home Getting Started MailChimp Authentication MailChimp Dashboard **Contacts** Leads Campaigns +

Search
Search All
Go!
Limit to items I own
Advanced Search...

Create New...

Recent Items
Akash Pandey
Akash b'day
Manmohan
Nilesh Raman
Dev Natani
Cloud MailChimp logo

Recycle Bin

Contact
Mr. Akash Pandey

Customize Page | Edit Layout | Printable View | Help for this Page

Back to List: Campaigns
Opportunities | Cases | Open Activities | Activity History | Campaign History | Notes & Attachments | HTML Email Status

Contact Detail
Edit Delete Clone Request Update

Contact Owner	Dev Natani [Change]	Phone	
Name	Mr. Akash Pandey	Home Phone	
Account Name		Mobile	
Title		Other Phone	
Department		Fax	
Birthdate		Email	akashp@appcino.com
Reports To	[View Org Chart]	Assistant	
Lead Source		Asst. Phone	
Mailing Address		Other Address	
Languages		Level	
Created By	Dev Natani, 6/23/2015 5:42 PM	Last Modified By	Dev Natani, 6/23/2015 5:42 PM

Akash Pandey

Email	akashp@appcino.com	Status	Not Synced
Created Date	06/23/2015	MailChimp List	--Select--

Sync

a. Sync: Adds specific contact/lead to any MailChimp List, which has not been previously included.

Contact
Mr. Akash Pandey

Customize Page | Edit Layout | Printable View | Help for this Page

Back to List: Apex Classes

Contact Detail
Edit Delete Clone Request Update

Contact Owner	Dev Natani [Change]	Phone	
Name	Mr. Akash Pandey	Home Phone	
Account Name		Mobile	
Title		Other Phone	
Department		Fax	
Birthdate		Email	akashp@appcino.com
Reports To	[View Org Chart]	Assistant	
Lead Source		Asst. Phone	
Mailing Address		Other Address	
Languages		Level	
Created By	Dev Natani, 6/23/2015 5:42 PM	Last Modified By	Dev Natani, 6/23/2015 5:42 PM

Akash Pandey

Email	akashp@appcino.com	Status	Not Synced
Created Date	06/23/2015	MailChimp List	--Select--

Sync

b.Update And Sync: Adds specific contact/lead to any other MailChimp List.

Contact
Mr. Akash Pandey

Customize Page | Edit Layout | Printable View | Help for this Page

« Back to List: Campaigns

[Opportunities \[0\]](#) |
 [Cases \[0\]](#) |
 [Open Activities \[0\]](#) |
 [Activity History \[0\]](#) |
 [Campaign History \[0\]](#) |
 [Notes & Attachments \[0\]](#) |
 [HTML Email Status \[0\]](#)

Contact Detail Edit Delete Clone Request Update

Contact Owner	Dev Natani [Change]	Phone	
Name	Mr. Akash Pandey	Home Phone	
Account Name		Mobile	
Title		Other Phone	
Department		Fax	
Birthdate		Email	akashp@apcino.com
Reports To	[View Org Chart]	Assistant	
Lead Source		Asst. Phone	
Mailing Address		Other Address	
Languages		Level	
Created By	Dev Natani 6/23/2015 5:42 PM	Last Modified By	Dev Natani 6/23/2015 5:42 PM

Akash Pandey

Created Date : 06/23/2015

Status : Synced

Synced with : Delhi clients

MailChimp List : --Select--

Update and Sync

7) Automatic Features

- a. All the occurrences of a contact/lead are updated in all MailChimp Lists when contact/lead's detail gets altered.
- b. When a lead (a MailChimp List member) is converted into a contact, then its relationship gets updated with the list and its occurrence as a lead gets vanished.