

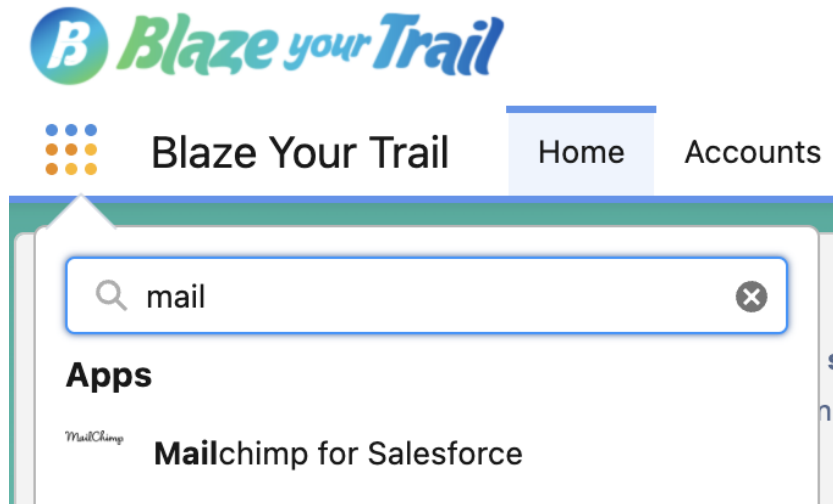
Mailchimp Integration

By Jessica Macpherson and [Jaclyn Liao](#)

Mailchimp Salesforce App	2
Mailchimp Setup	2
Creating Leads for your Mailchimp Subscribers	3
Data Sync	3
Manual Data Synchronisation	5
Audiences	6
Mapping Fields	6
Member Queries	9
New Query	10
Filters	11
Name and Schedule	11
Run Query Manually	12
Refresh MC Campaigns	13
Update Stats	13
The Mailchimp Widget	14
Segments	15
Email Deliverability	15
Soft Bounce	15
Archive, NOT Unsubscribe	15
Help Documentation	16

Mailchimp Salesforce App

In Salesforce, click on the App Launcher (the 9-dot sign on the top left hand side) and search for the Mailchimp for Salesforce App.



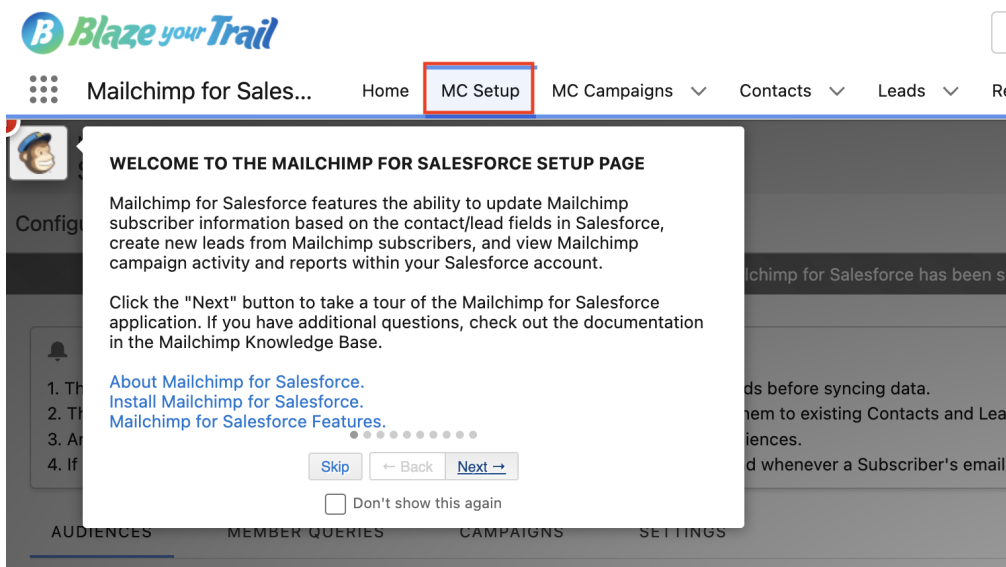
If you cannot find the Mailchimp for Salesforce App in the App Launcher, please contact your Salesforce System Administrator and ask to be assigned the relevant Mailchimp permission sets.

1. To view Mailchimp Subscriber info in Salesforce you need the Mailchimp **User** permission set
2. To use the Map Fields function you need the Mailchimp **Admin** permission sets

Note: If the Permission Set is added after the Mailchimp App has already been opened, the App needs to be reopened to ensure the updated access level is applied.

Mailchimp Setup

When you log into the Mailchimp for Salesforce App for the first time you get a Welcome Pop Up.



Please read all the suggestions in the pop-up window "WELCOME TO THE Mailchimp FOR SALESFORCE SETUP PAGE." It provides some tips and important information regarding Mailchimp integration.

We have included the 10 Pop Up screenshots in this document - identified by the red number in the top left corner of each page.

Creating Leads for your Mailchimp Subscribers

Blaze Your Trail recommends that you **do not** enable the feature that allows Mailchimp to create leads in Salesforce from subscriber information.



This is because most charities have a sign up to the newsletter option in the footer of their website, that often only captures an email address, or sometimes a first name. You must have a full name to create a lead in Salesforce - first and last name.

Even if you are capturing first and last name, what would you do with this lead information in Salesforce? If you are not sure – don't enable!

Data Sync

We recommend that you **do** enable the Data Sync. This app works best when field mappings are complete. We recommend mapping fields before syncing data.

The screenshot shows the Mailchimp for Salesforce Setup page. A notification banner at the top states: "The Mailchimp for Salesforce has been set up and is ready to start synchronizing data. Click the 'Data Sync' button on the Settings tab to start the magic." Below this is a 'Tips' section with four numbered points. The first tip is highlighted with a red box: "1. This app works best when field mappings are complete. We recommend mapping fields before syncing data." Below the tips is a table with the following data:

ACTION	AUDIENCE NAME	SYNC SETTING	CREATE LEADS FROM MC	UNMAPPED FIELDS	LAST SYNC	SYNC STATUS	# SUBSCRIBERS	# UNSUBSCRIBERS
Map Fields Sync Audience	Blaze Your Trail	Sync Subscriber	<input type="checkbox"/>	0	7/24/2023 9:27 AM	Success	1121	44
Map Fields Sync Audience	Test	Sync Subscriber	<input type="checkbox"/>	10	7/24/2023 7:18 AM	Success	8	0

The initial sync will update the Mailchimp Subscriber fields any leads or contacts in Salesforce with a matching Email address. If there is more than one email address saved to the contact record, it will only look at the preferred email address.

The screenshot shows a modal dialog box titled "Data Sync" with the subtitle "TURN ON/OFF DATA SYNC". The main text reads: "Enabling the data sync feature will schedule a series of batch tasks. The data sync updates your Mailchimp subscriber fields with the corresponding contact/lead field data each hour, and it updates the Salesforce contacts/leads with the Mailchimp subscriber campaign activity each night." Below the text are three buttons: "Skip", "← Back", and "Next →". At the bottom, there is a checkbox labeled "Don't show this again".

The following fields are only visible to MC Admin and MC Users - you must assign the Permission Sets to see these.

1. The MC Subscriber field is a concatenate of the subscribers email and the Audience (Newsletter) that they are subscribed to
2. The MC Status field can have the following options - subscribed, unsubscribed, non-subscribed, cleaned, and pending (this is a custom formula field)

You might like to add these fields to the page layout as we have done here:

The screenshot shows a 'Communication Preferences' section with two columns of fields. The first column contains: 'MC Subscriber' (value: jessica@blazeyourtrail.org - Newsletter), 'MC Status' (value: Subscribed), 'Email Opt Out' (checkbox), and 'Fax Opt Out' (checkbox). The second column contains: 'Newsletter Opt In' (checkbox, checked), 'Do Not Call' (checkbox), 'Deceased' (checkbox), 'Do Not Contact' (checkbox), and 'Contact Flag' (value: OK to Contact). Red boxes highlight the 'MC Subscriber', 'MC Status', 'Newsletter Opt In', and 'Contact Flag' fields.

In the example shown above, we have created a new section called Communication Preferences, and grouped all the Standard Salesforce fields along with some custom ones:

- *Email opt out, Fax opt out (!), Do not Call, Deceased and Do Not Contact are all NPSP standard fields*
- *Newsletter Opt In and Contact Flag are customisations*

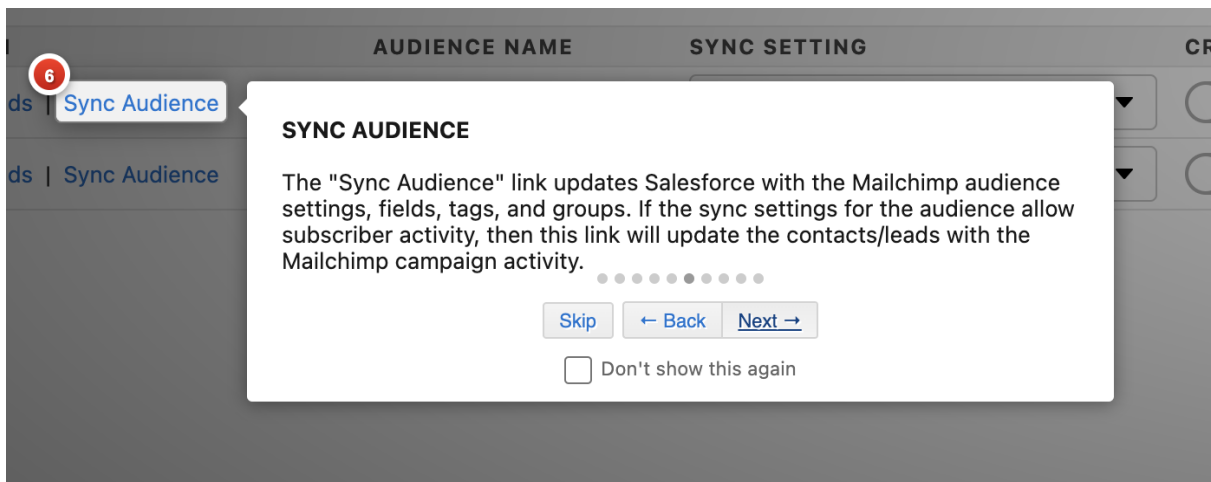
The hourly sync keeps the data between Salesforce and Mailchimp up-to-date.

For example, should you change the Primary Affiliation on a Contact record in Salesforce, and you have this mapped to Company/Organisation in Mailchimp, you can log into Mailchimp and check the subscribers profile to see the change.

The Data Sync only updates the values from Salesforce for the contacts that already exist as subscribers in Mailchimp. To add new subscribers, you need to run a Query.

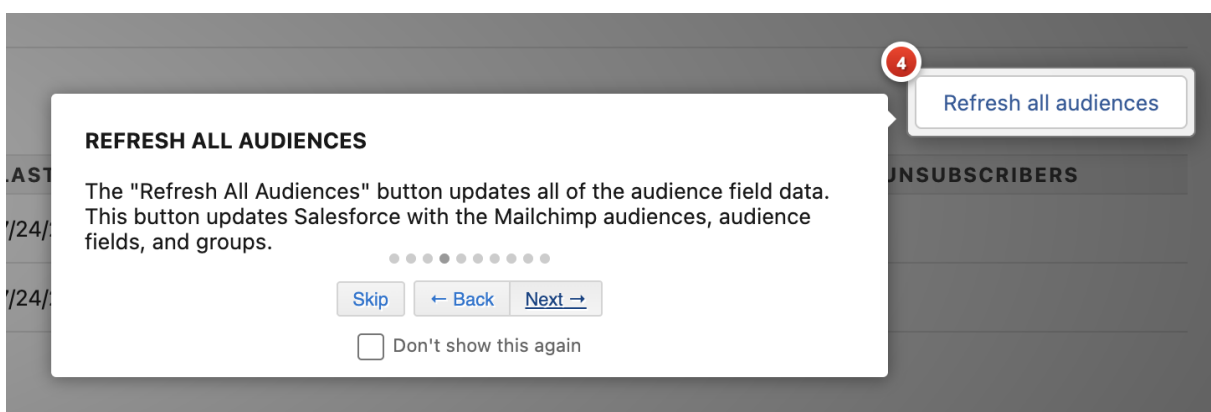
Manual Data Synchronisation

If needed, you can manually sync the audience data by clicking "Sync Audience."



Audiences

If you make any changes to your Audiences in Mailchimp – such as changing the Audience Name – you can Refresh all Audiences in the MC Set Up so that these changes are visible in Salesforce.

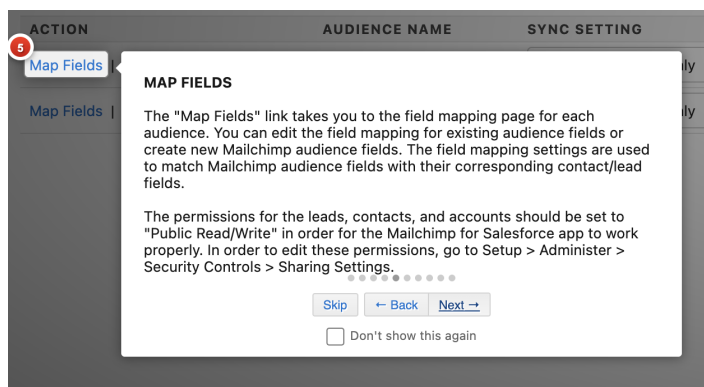


Mailchimp charges are based on the number of subscribers in each audience. If you have the same subscribers on 2 audiences, you pay double.

For this reason, it's best to maintain a single Audience where possible.

Some exceptions might be distinguished stakeholders requiring special communications, or vulnerable beneficiaries not engaged in marketing or fundraising.

Mapping Fields



In Salesforce, Navigate to MC Setup > Audiences > Map Fields, in front of the desired Audience Name.

MAILCHIMP FOR SALESFORCE Setup

Configure the Mailchimp for Salesforce application

The Mailchimp for Salesforce has been set up and is ready to start synchronizing data. Click the "Data Sync" button on the Settings tab to start.

Tips

1. This app works best when field mappings are complete. We recommend mapping fields before syncing data.
2. The initial hourly sync will upload all Mailchimp subscribers into Salesforce and link them to existing Contacts and Leads.
3. An initial upload usually takes a few minutes, but can take several hours for large audiences.
4. If the Create Leads from MC option is chosen, the sync process will create a new Lead whenever a Subscriber's email address cannot be found on an existing Salesforce Contact configuration is ready for an initial upload!

AUDIENCES | MEMBER QUERIES | CAMPAIGNS | SETTINGS

ACTION	AUDIENCE NAME	SYNC SETTING	CREATE LEADS FROM MC	UNMAPPED FIELDS	LAST SYNC	SYNC STA
Map Fields Sync Audience	Newsletter	Sync Subscribers Only	<input type="checkbox"/>	0	8/8/2023 12:27 PM	Success
Map Fields Sync Audience	Test	Sync Subscribers Only	<input type="checkbox"/>	10	7/24/2023 7:18 AM	Success

On the Mappings page, match Salesforce Contact Fields to Mailchimp Fields. The Salesforce Contact Fields column's value will be used for mapping unless there is no Contact record, in which case the Lead column's value will be used.

The screenshot shows the Mailchimp interface for 'Blaze Your Trail'. The page title is 'MAILCHIMP FOR SALESFORCE Mailchimp Audience - Blaze Your Trail'. Below the title, there is a navigation bar with 'Home', 'MC Setup', 'MC Campaigns', 'Contacts', 'Leads', 'Reports', and 'MC Subscriber Activity'. The main content area is titled 'Mappings' and includes a sub-header: 'Choose the Salesforce fields that map to the Mailchimp fields on the right. The value specified in the Contact column will be used in the mapping unless no Contact record exists, in which case the value will come from the field specified in the Lead column.'

SALESFORCE LEAD FIELD	SALESFORCE CONTACT FIELD	MAILCHIMP FIELD
Address	Mailing Address	Address
Company	Primary Affiliation Display Name	Company
Lead Type	Contact Type	Contact Type
First Name	First Name	First Name
Last Name	Last Name	Last Name
--None--	Newsletter Opt In	Newsletter Opt In
Mobile Phone	Mobile Phone	Phone Number
--None--	Primary Affiliation Type	Primary Affiliation Type
--None--	Project Status	Project Status
--None--	Volunteer Status	Volunteer Status

Add a new audience field

Field Type: (Dropdown menu showing 'Text' and 'Number')
 Field name:
 Field required

To add a new field, click "Add a new audience field" at the bottom of the page. There are limited Field Types in Mailchimp. It is recommended to keep the Field Name the same as in Salesforce. Once completed, return to the MC Setup object. (NOTE: There is no SAVE button on the Mappings Page)

Note: You may need to ask your System Admin to update your Sharing Settings if you cannot see a Custom Field used in the field mapping

New fields will be created in real-time in Mailchimp. Check in Mailchimp to confirm field creation. Some organisations that have a shortage of user licences may choose to sync comprehensive data into Mailchimp so that marketing specialists can work solely in Mailchimp.

If you want to delete any unneeded fields, go to Mailchimp, Audience -> Settings -> Audience fields and *|MERGE|* tags -> BIN icon -> enter DELETE to confirm deletion.

Here is a list of commonly synched fields

- Primary Affiliation Display Name (MC label: Organisation)
- Primary Affiliation Type
- Household Level
- Contact Type
- Regular Donor Status / Sustainer Status
- Last Gift amount
- Last Campaign Display Name (MC label: Last Campaign)
- Last Gift Date
- Total Gifts
- Total Number Gifts
- Last Volunteer Date (if using V4S actively)
- Membership Status (if using this Opp Record Type)

Note: Some of these fields are custom formula fields.

Member Queries

The Query Builder allows you to pass Salesforce contacts, leads, and campaign members who share specific Salesforce field data into your Mailchimp audience.

You can run a query manually or schedule it to run daily with data sync. Queries that are run manually will add new contacts to your Mailchimp audience, but won't update existing contact information. To update existing contact information, you'll need to use data sync.

To create a new Query, use the New Query at the top right hand side of the page.

Important

- *Salesforce contacts and leads who checked the Email Opt-Out field won't be included in query results.*

- When a contact is deleted from an audience in Mailchimp, it doesn't affect the profile of the associated contact or lead in Salesforce.
- If a lead or contact opts-out in Salesforce after they are added to your Mailchimp audience, they won't be unsubscribed in Mailchimp.
- See this article [How to Manage Contact Communication Preferences with the Salesforce and Mailchimp Integration.](#)

MAILCHIMP FOR SALESFORCE
Setup

Configure the Mailchimp for Salesforce application

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3. An initial upload usually takes a few minutes, but can take several hours for large audiences.
4. If the Create Leads from MC option is chosen, the sync process will create a new Lead whenever a Subscriber's email address cannot be found on an existing Salesforce Contact or Lead. Please be sure your org's Lead configuration is ready for an initial upload!

AUDIENCES **MEMBER QUERIES** CAMPAIGNS SETTINGS

New Query

ACTION	QUERY NAME	AUDIENCE	LAST RUN AS	QUERIED OBJECTS	SCHEDULE	LAST RUN	LAST STATUS	SUBSCRIBERS ADDED
Edit Delete Schedule Run Query	Blaze Your Trail - Newsletter True	Blaze Your Trail	Jessica Macpherson	Contact	1:00 AM	8/4/2023 2:59 PM	Success	7

NEW QUERY

The "New Query" button takes you to the query builder. Queries function to subscribe contacts/leads to the Mailchimp audience, and to update existing Mailchimp audience subscribers based on the corresponding contacts/leads in Salesforce. When updating existing subscribers, the Salesforce data will overwrite the Mailchimp audience field data. Using the filters on step two of the query builder, it's possible to query all of the contacts/leads or to query specific contacts/leads based on their Salesforce field data.

● ● ● ● ● ● ●

[Skip](#) [← Back](#) [Next →](#)

Don't show this again

New Query

New Query

In this demo, we will create a new Query using the Blaze Your Trail Audience. Here you can utilise Mailchimp Tags for segmentation purposes.

MAILCHIMP FOR SALESFORCE

New Query

Use this tool to create a new query that will be used to determine the Salesforce data you want to migrate to Mailchimp.

Audience Selection
Filters
Preview

Select an audience

Select the audience to populate with this query's results. You may also select tags and interests for your selected audience.

Audience Blaze Your Trail

Groups

Unsubscribe me from news about

Salesforce Innovatio...

Fundraising Inspirat...

Alumni Stories

Tags

[+ Create a new tag](#)

Fundraising

Mother's Day

volunteers

Current Active Statu...

Winter 23

Filters

To handle the large number of records in the Query, we can apply filters to narrow down the number of contacts to be added to Mailchimp as subscribers. Here we have filtered Contacts who have opted into the newsletter and are active volunteers.

MAILCHIMP FOR SALESFORCE

New Query

Use this tool to create a new query that will be used to determine the Salesforce data you want to migrate to Mailchimp

Audience Selection
Filters
Preview
Name and Schedule

Blaze Your Trail - 2023-08-07

Build Filters

Select the audience to populate with this query's results. You may also select tags and interests for your selected audience.

Lead Contact Campaign Members

My Contacts only

Contact

	FIELD	OPERATOR	VALUE	
×	Newsletter Opt In	Equals	TRUE	AND
×	Volunteer Status	Equals	Active	

[+ Add row](#)

Name and Schedule

IMPORTANT: To ensure clarity, give the Query a meaningful name that best reflects the list.

When running a new Query for the first time, set the date back as far as possible on the “Last Run Date.”

This ensures that all contacts created since the beginning of time who match the filter criteria will be added to Mailchimp.

The second time you run the Query you can schedule it to run daily if required – do this overnight sometime.

Execute the Query to add the Contacts from Salesforce to Mailchimp.

Select a few new contacts in Mailchimp to verify the successful execution of the Query.

MAILCHIMP FOR SALESFORCE
New Query

Use this tool to create a new query that will be used to determine the Salesforce data you want to migrate to Mailchimp

Audience Selection Filters Preview **Name and Schedule**

Blaze Your Trail - 2023-08-07

Name and schedule

Choose to schedule your query to run every day or now.

MC Query name

Run daily at

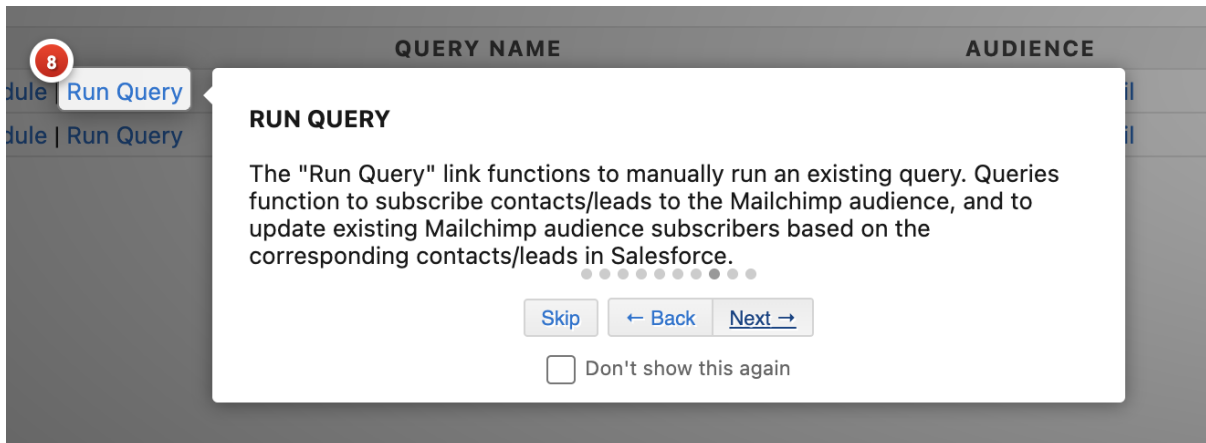
Last Run Date [\[7/8/2023, 5:22 pm \]](#)

Last Run Date reflects the date and time that the query was last run. Each time the query runs, it will fetch all records created or updated after the Last Run Date.

If you would like to run the query for records that were created or updated before this date (for example, the query filters were updated), you can do this by editing the Last Run Date to a date in the past that is before the date that your records were created or updated. The next time the query runs, it will query all records created or updated after the date you specify in Last Run Date.

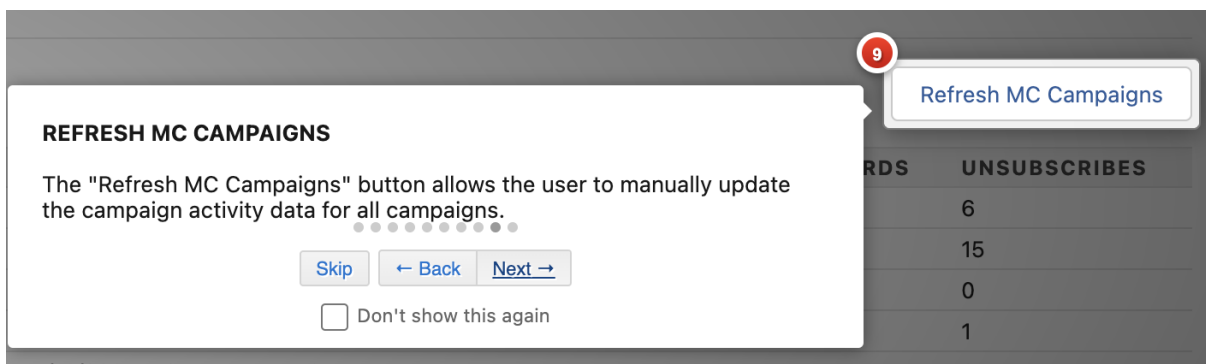
Run Query Manually

You can Manually Run a Query at any time, instead of waiting for the Query to Run overnight.



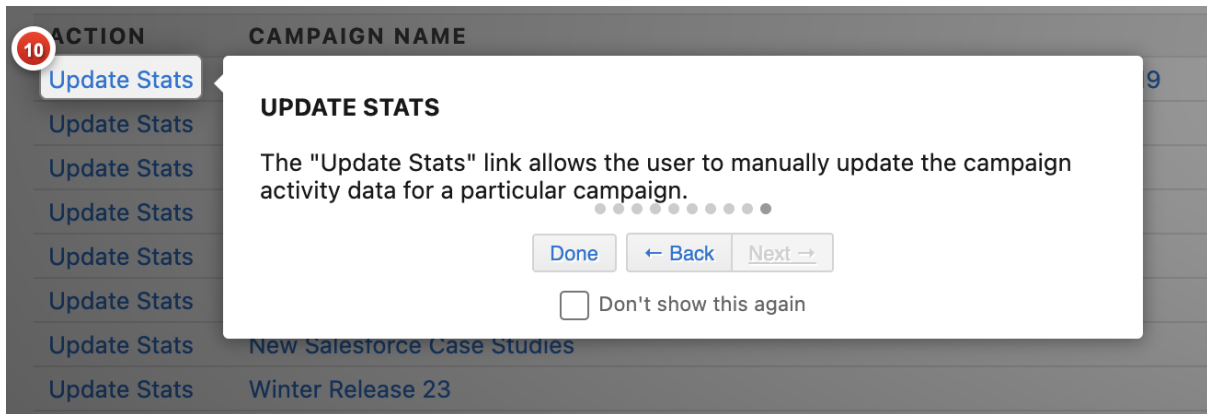
Refresh MC Campaigns

Campaign Data is stored in an Object in Salesforce called MC Campaigns. You can view this data on the third tab in the MC Setup called Campaigns. This button allows you to update campaign activity in Salesforce.



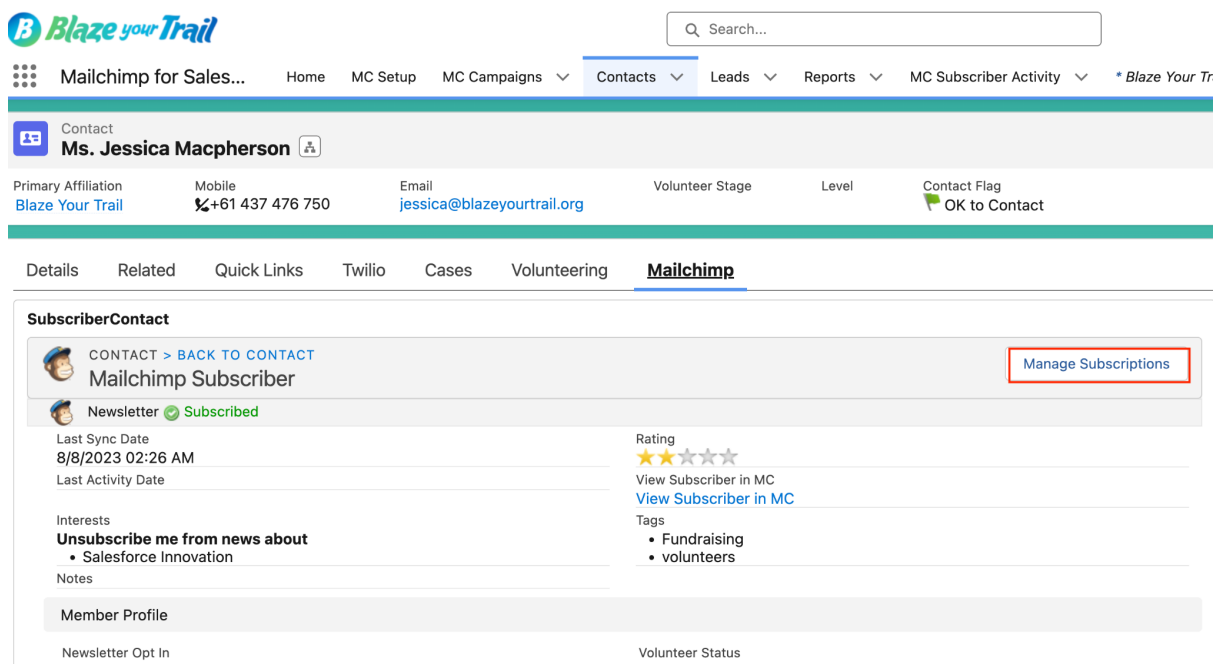
Update Stats

This button allows you to manually update the campaign activity for a particular campaign.



The Mailchimp Widget

This allows you to see the subscribers details from within Salesforce. We have added this to a custom tab on the Contact record called Mailchimp.



This also displays my preferences and tags. If you choose to Manage Subscriptions you can see that I am subscribed to two Audiences in our Mailchimp account. This is where we Unsubscribe Contacts manually should they ask to be removed. Please see [How to Manage Contact Communication Preferences with the Salesforce and Mailchimp Integration.](#)

CONTACT > JESSICA MACPHERSON
Mailchimp Subscriptions

Audiences

Newsletter	Subscribed Unsubscribe
Test	Subscribed Unsubscribe

Segments

There are three ways to segment subscribers in Mailchimp: [Groups](#), [Segments](#), and [Tags](#). Please refer to the hyperlink for more information in Mailchimp.

The Groups function in Audience allows the information to be visible in the Mailchimp preference centre. A preference centre provides visitors the ability to determine the type or frequency of communication.

Email Deliverability

Soft Bounce

To improve digital engagement and deliverability in Mailchimp, consider archiving subscribers with increasing soft bounces.

Lowering the soft bounce rate leads to better results. Mailchimp allows seven soft bounces for an email address with no subscriber activity and up to 15 soft bounces for contacts with previous subscriber activity before converting a soft bounce into a hard bounce.

If an email address continues to soft bounce in additional campaigns, it will eventually be considered a hard bounce and removed from your audience.

Archive, NOT Unsubscribe

We recommend you archive Soft Bounce Subscribers in Mailchimp.

When you archive contacts, they won't count towards your audience limits.

After archiving the contacts, they will cease receiving marketing emails, and you will no longer pay for their subscriptions.

Remember to check the [link](#) provided for different types of contacts.

Help Documentation

[About the Salesforce Integration](#)

[Connect Your Salesforce Account to Mailchimp](#)

[Use the Salesforce Query Builder](#)

[How to Manage Contact Communication Preferences with the Salesforce and Mailchimp Integration.](#)