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Introduction to MailChimp Sync

CoreWare has the ability to sync your CoreWare database with your MailChimp database for mass mailings. The categories, contacts and lists that you create in CoreWare will be synched to MailChimp. Once synched, you can send mass emails to the contact lists using MailChimp.

View Saved Segments ▾		Create A Segment					
▼	Email Address	First Name	Last Name	Mailing Lists	Categories	Designations	Designation Groups
<input type="checkbox"/>	jenny.cunanan@coreware.co... >	Jenny	Cunanan				
<input type="checkbox"/>	cj_russell@ydc.com >	Christine and James	Russell				
<input type="checkbox"/>	john.reese@gmail.com >	John	Reese	Newsletter			
<input type="checkbox"/>	sarah.moore@gmail.com >	Sarah	Moore		Donor	General Donation	Corporate Gifts
<input type="checkbox"/>	jonathan.walker@gmail.com >	Jonathan	Walker	Newsletter	Donor	General Donation, Other Donations	Corporate Gifts, Staff Supp
<input type="checkbox"/>	john.moore@gmail.com >	John	Moore	Newsletter	Donor	General Donation	Corporate Gifts
<input type="checkbox"/>	jillian.moore@gmail.com >	Jillian	Moore			General Donation	Corporate Gifts
<input type="checkbox"/>	jane@gmail.com >	Jane	Moore	Newsletter	Donor		
<input type="checkbox"/>	mary.baker@gmail.com >	Mary	Baker	Newsletter	Donor	General Donation, Disaster Relief Donation	Corporate Gifts
<input type="checkbox"/>	jack.faulkner@gmail.com >	Jacob	Faulkner		Donor	General Donation, Back-to-School Drive	Corporate Gifts

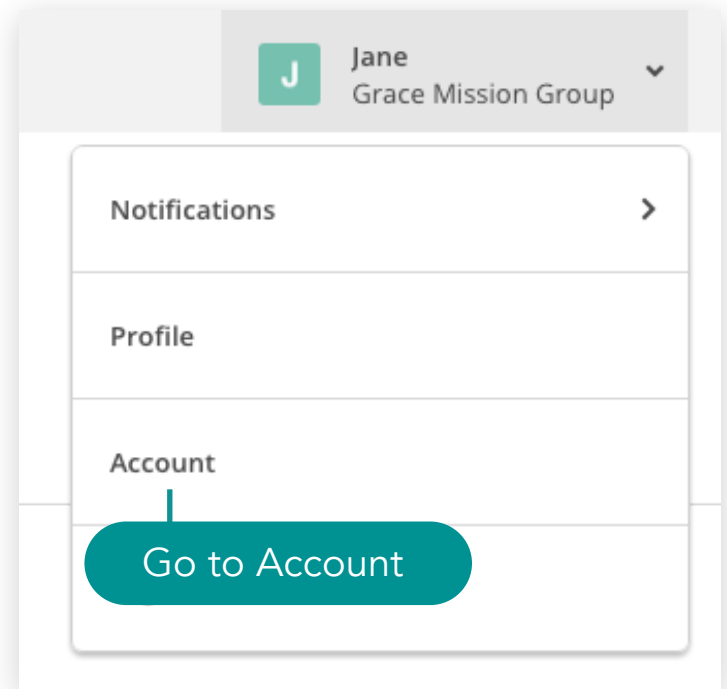
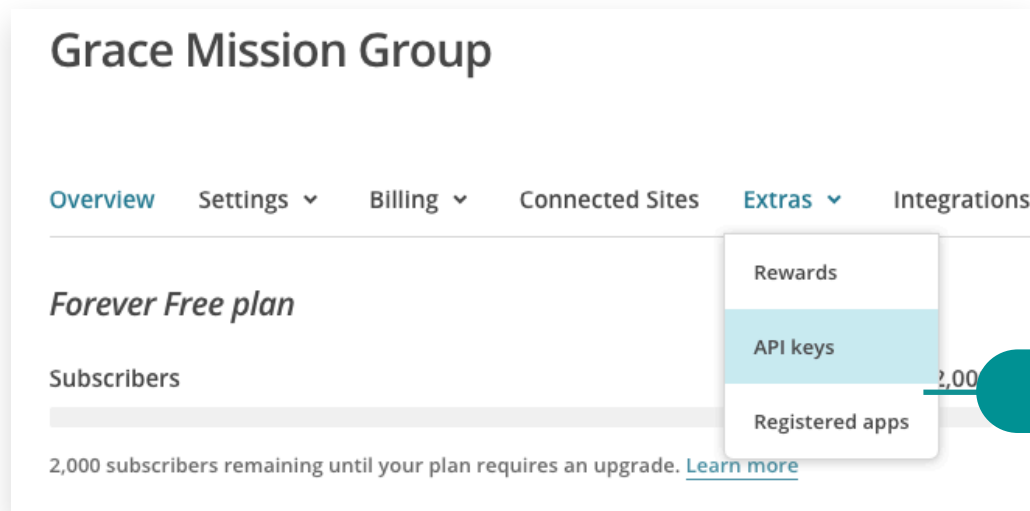
MailChimp Contact List



Create a MailChimp API key

You will need to create your MailChimp API key in order to integrate MailChimp with CoreWare.

1. Go to [MailChimp.com](https://mailchimp.com) and register if you don't have an account yet.
2. Click on your username then select **Account**.
3. Click on the **Extras** menu then select **API Keys**.



Go to Extras - API keys



4. Click **Create API Key**. This will generate a MailChimp API key. You can optionally add a label to the API key.

Your API keys

API keys provide full access to your MailChimp account, so keep them safe. [Tips on keeping API keys secure.](#)

You don't have any active API keys.

[Click to generate an API key](#) [Create A Key](#) [Create A Mandrill API Key](#)

Your API keys

API keys provide full access to your MailChimp account, so keep them safe. [Tips on keeping API keys secure.](#)

Created	User	Label	API key	QR Code	Status
Jun 19, 2017 4:23 am	Jenny Cunanan (owner)	none set	e9d8e44cff56e84ad0d3b585b2092ci	QR	<input checked="" type="checkbox"/>

[Create A Key](#) [Create A Mandrill API Key](#)

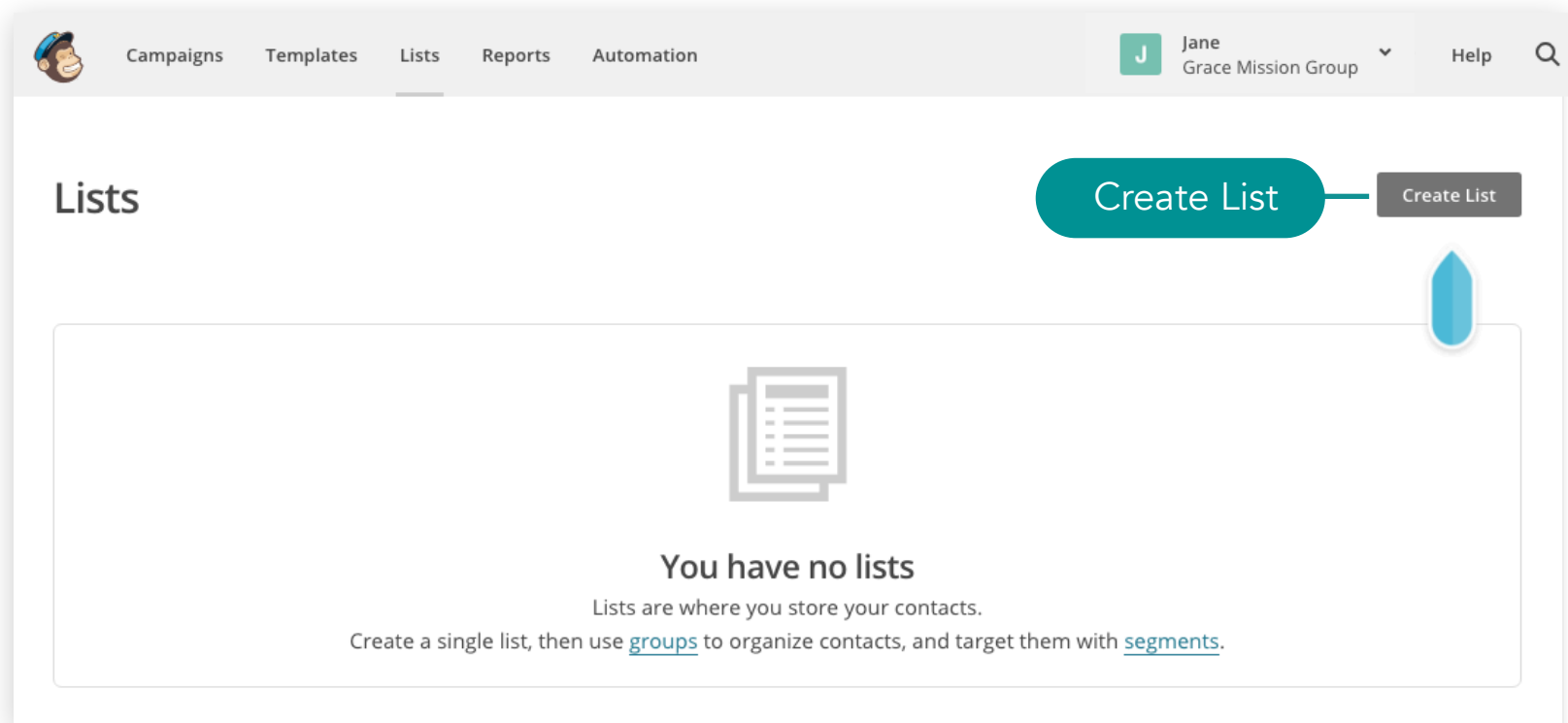
API key



Create a MailChimp List

You will need to create your MailChimp list in order to synchronize your contracts.

1. Go to [MailChimp.com](https://mailchimp.com) and click **List** from the top menu.
2. Click **Create List**.





3. Enter the list name e.g. Master List.
4. Enter the default From email address and the default From name.
5. Enter a reminder for people for how they got the email e.g. You are getting these emails because you opted in to our website.
6. Click **Save**.

Create List

List details

List name

FROM email address

Default From email address

admin@gracemissiongroup.com

Default From name

Grace Mission Group

Campaign URL settings

Reminder for recipients on how they signed to your list

Remind people how they signed up to your list

You are getting these emails because you opted in to our website.

Contact information for this list · [Why is this necessary?](#)

Grace Mission Group
123 Main
Dallas, Texas 75202

Edit



Set up your MailChimp client preference

To begin syncing with MailChimp, you will need to set up your MailChimp API and MailChimp List ID in the client preferences.

1. Get your MailChimp API Key. Go to [MailChimp.com](https://mailchimp.com). Click on the username then select **Accounts**. Click **Extras** then select **API Keys**.
2. Find your API key and copy.
3. Go to the CoreWare admin menu. Go to **System > Preferences > Client Preferences**. Click **Add**.
4. Click on the **Preference** dropdown and select **MailChimp API Key**.
5. Copy the **MailChimp API Key** in MailChimp and paste in the **Client Setting** field then save.

Client Preferences

SAVE ADD DELETE LIST

Choose the MailChimp API key

Preference*
MailChimp API Key

Preference Qualifier

Add the API key

Client Setting
e9d8e44cff56e84ad0d3b585b2092cad-us

Your API keys

API keys provide full access to your MailChimp account, so keep them safe. [Tips on keeping API keys secure.](#)

Created	User	Label	API key
Jun 19, 2017 4:23 am	Jenny Cunanan (owner)	none set	e9d8e44cff56e84ad0d3b585b2092cad-us

Create A Key

Create A Mandrill API Key

API key



6. Get your **MailChimp List ID**. Go to [MailChimp.com](https://mailchimp.com). Click **Lists** from the top menu.
7. Click on the list to open. Click **Preferences** and select **List Name and Campaign Defaults**.
8. Copy the List ID for the list.
9. Go to the CoreWare admin menu. Go to **System > Preferences > Client Preferences**. Click **Add**.
10. Click on the **Preference** dropdown and select **MailChimp List ID**.
11. Paste the List ID in the **Client Setting** field.
12. Click **Save**.
13. Once you have the 2 preferences set up, CoreWare can connect to MailChimp.

The screenshot shows the 'Master List' settings page in MailChimp. At the top, there's a navigation bar with 'Stats', 'Manage contacts', 'Add contacts', 'Signup forms', 'Settings', and a search icon. Below this is the section 'List name and campaign defaults'. On the left, the 'List name' is set to 'Master List'. On the right, the 'List ID' is displayed as '4b8f898ee4'. A teal callout bubble points to the List ID with the text 'Get the list ID'. A light blue box on the left contains a note about changing the signup form title.

Master List

Stats ▾ Manage contacts ▾ Add contacts ▾ Signup forms Settings ▾ 🔍

List name and campaign defaults

List name: Master List

List ID: 4b8f898ee4

Some plugins and integrations may request your List ID. Typically, this is what they want: 4b8f898ee4.

Want to change your signup form title? The signup forms and confirmation emails for your list use the original list name as a title. You can update this text (or replace it with an image) in the [signup form editor](#).

Get the list ID

The screenshot shows the 'Client Preferences' page in CoreWare. At the top, there are buttons for 'SAVE', 'ADD', 'DELETE', and 'LIST'. Below these is a 'Preference' dropdown menu with a teal callout bubble pointing to it that says 'Select the MailChimp List ID preference'. The dropdown is currently set to 'MailChimp List ID'. Below this is a 'Preference Qualifier' field, and then a 'Client Setting' field containing the value '4b8f898ee4'. A teal callout bubble points to this field with the text 'Add the list ID'.

Client Preferences

SAVE ADD DELETE LIST

< Select the MailChimp List ID preference

Preference * MailChimp List ID

Preference Qualifier

Client Setting 4b8f898ee4

Add the list ID



Segment your MailChimp list into groups

To get your contacts synched properly in MailChimp, you need to divide the MailChimp list into groups. You will need to create the top level group categories and groups for each list.

1. There are about 7 group categories that CoreWare will look for in MailChimp. It is important that the group category and group descriptions matches the ones in CoreWare.
2. To create a category group, open the MailChimp list. Click **Manage Contacts** then select **Groups**.
3. Click **Create Groups**.

Master List

Switch list ▾

Stats ▾ Manage contacts ▾ Add contacts ▾ Signup forms Settings ▾ 🔍

Groups

Create a new group

Create Groups

How do groups work?

Groups let you categorize subscribers by things like interests and preferences. Subscribers can select groups for themselves, or you can put subscribers into groups within MailChimp.



4. Create the following category group names e.g. Mailing List then define the group for each one e.g. Newsletter and Memo. So if you have a mailing list in CoreWare with the description, "Newsletter", the group name description in MailChimp should also be "Newsletter". **Note:** If a MailChimp category group or category description does not match anything in CoreWare, CoreWare will ignore it.
- a. **Mailing List** - This category group corresponds with CoreWare's mailing list that is managed from **Contacts > Email > Mailing Lists**. All contacts that opted to the CoreWare mailing list will automatically belong to the group in MailChimp.

Mailing Lists

[Choose Action] ▾

1 - 2 of 2, 0 selected

	Mailing List Code	Description
<input type="checkbox"/>	NEWSLETTER	Newsletter
<input type="checkbox"/>	MEMO	Memo

CoreWare mailing lists

How should we show group options on your signup form?

☒ As checkboxes (people can select more than one)

☐ As radio buttons (people can select only one)

☐ As a dropdown (people can select only one)

☐ Don't show these groups on my signup form

Group category

Mailing Lists

Group names

- Newsletter
- Memo
- Events

Add Group

Save Cancel

MailChimp Group



- b. **Categories** - This category group corresponds with CoreWare's contact categories that are managed from **Contacts > Settings > Categories**. All contacts that are assigned to the contact category in CoreWare will automatically belong to the group in MailChimp.

Contact Categories

[Choose Action]

< 1 - 2 of 2, 0 selected >

	Category Code	Description	Ca
<input type="checkbox"/>	STAFF	Staff	
<input type="checkbox"/>	DONOR	Donor	

CoreWare Contact Categories

How should we show group options on your signup form?

☒ As checkboxes (people can select more than one)

☐ As radio buttons (people can select only one)

☐ As a dropdown (people can select only one)

☐ Don't show these groups on my signup form

Group category

Categories

Group names

Staff

Donor

Events

Add Group

Save [Cancel](#)

MailChimp Group



- c. **Designations** - This category group corresponds with CoreWare's designations that are managed from **Donor Management > Designations**. All contacts that have donated to the designation will automatically belong to the group in MailChimp.

Designation Maintenance

[Choose Action]

1 - 7 of 7, 0 selected

	Designation Code	Description
<input type="checkbox"/>	MEDICAL_OUTREACH	Medical Outreach
<input type="checkbox"/>	TRAINING	Training Workshops
<input type="checkbox"/>	BACK_TO_SCHOOL	Back-to-School Drive
<input type="checkbox"/>	GENERAL_DONATION	General Donation
<input type="checkbox"/>	DISASTER_RELIEF_DONATION	Disaster Relief Donation
<input type="checkbox"/>	OTHER_DONATIONS	Other Donations
<input type="checkbox"/>	COMMUNITY_SERVICE	Community Service

CoreWare Designations

How should we show group options on your signup form?

☒ As checkboxes (people can select more than one)

☐ As radio buttons (people can select only one)

☐ As a dropdown (people can select only one)

☐ Don't show these groups on my signup form

Group category

Designations

Group names

- General Donation
- Disaster Relief Donatio
- Community Service
- Medical Outreach
- Back-to-School Drive
- Training Workshops
- Other Donations

Add Group

Save [Cancel](#)

MailChimp Group



- d. **Designation Groups** - This category group corresponds with CoreWare's designation groups that are managed from **Donor Management > Designation Groups**. All contacts that have donated to designations that are assigned to the designation group will automatically belong to the group in MailChimp.

Designation Group Main

[Choose Action] ▼

1 - 4 of 4, 0 selected

	Code	Description
<input type="checkbox"/>	CORPORATE_GIFTS	Corporate Gifts
<input type="checkbox"/>	STAFF_SUPPORT	Staff Support
<input type="checkbox"/>	DAILY_PROCESSINGS	Daily Processings
<input type="checkbox"/>	NO_FEES	No Fees

CoreWare Designation Group

How should we show group options on your signup form?

☒ As checkboxes (people can select more than one)

☐ As radio buttons (people can select only one)

☐ As a dropdown (people can select only one)

☐ Don't show these groups on my signup form

Group category **MailChimp Group**

Designation Groups

Group names

- Corporate Gifts
- Staff Support
- Daily Processings
- No Fees

Add Group

Save [Cancel](#)



- e. **Form Definitions** - This category group corresponds with CoreWare's form definitions that is managed from **Forms > Definitions**. Any contact that filled up the form will automatically belong to the group in MailChimp.

Form Definitions

[SAVE](#) [ADD](#) [DELETE](#) [LIST](#)

[<](#) **CoreWare Form Definition**

Description*
GMG - Contact Us

Details **Form** Javascript Introduction Response Status

Category
Donors

Contact Type
[None]

Mailing Lists

Filter Choices

Memo

Newsletter

✓ ✕ ⌵

How should we show group options on your signup form?

☒ As checkboxes (people can select more than one)

☐ As radio buttons (people can select only one)

☐ As a dropdown (people can select only one)

☐ Don't show these groups on my signup form

Group category **MailChimp Group**

Form Definitions

Group names

GMG - Contact Us

Volunteering

Events

Add Group

Save [Cancel](#)



- f. **User Groups** - This category group corresponds with CoreWare's user groups that are managed from **Contacts > Users > Groups**. Any contact that is also a user that is assigned to a User Group in CoreWare will automatically belong to the group in MailChimp.

User Groups

[Choose Action] ▼

1 - 3 of 3, 0 selected

	Code	Description	S
<input type="checkbox"/>	ADMIN	Admin	
<input type="checkbox"/>	STAFF	Staff	
<input type="checkbox"/>	DONOR	Donor	

CoreWare User Group

How should we show group options on your signup form?

☒ As checkboxes (people can select more than one)

☐ As radio buttons (people can select only one)

☐ As a dropdown (people can select only one)

☐ Don't show these groups on my signup form

Group category

MailChimp Group

User Groups

Group names

Admin

Staff

Donor

Add Group

Save Cancel



- g. **Product Categories** - This category group corresponds with CoreWare's product that are managed from **Products > Taxonomy > Categories**. Any contact that purchased a product in this category will automatically belong to the MailChimp group.

Product Categories

[Choose Action]

< 1 - 2 of 2, 0 selected >

	Product Category Code	Description
<input type="checkbox"/>	MISSION_CATALOG	Mission Catalog
<input type="checkbox"/>	PUBLICATIONS	Publications

CoreWare Product Categories

How should we show group options on your signup form?

☒ As checkboxes (people can select more than one)

☐ As radio buttons (people can select only one)

☐ As a dropdown (people can select only one)

☐ Don't show these groups on my signup form

Group category **MailChimp Group**

Product Categories

Group names

- Mission Catalog
- Publications
- Events

[Cancel](#)



Sync the CoreWare database to the MailChimp database

Syncing is done easily from the MailChimp Sync menu. Remember that the sync is one-directional and it goes from CoreWare to MailChimp only. Anything that you update from MailChimp will not reflect on CoreWare so updates to the category groups, contact information etc. need to be done in CoreWare.

1. Make all the changes that you need in CoreWare before syncing.
2. Go to **Contacts > Email > MailChimp Sync**.
3. There are 3 options to set a limit to the contacts to sync.

a. **Limit product purchases in the last x days** -

If you want to, for example, send emails to contacts who made purchases within the last 90 days, enter the number 90. If you want to include all contacts that made a purchase, leave this field blank.

b. **Limit donations in the last x days** - If you want to, for example, send emails to contacts who made donations within the last 30 days, enter the number 30. If you want to include all contacts that made donations, leave this field blank.

c. **Include (ALL) contacts (not just those in MailChimp groups)** - Check if you want to sync all contacts from Coreware to MailChimp.

Limit Product Purchases to last X Days
leave blank to include all

Limit Donations to last X Days
leave blank to include all

☒ Include ALL contacts (not just those in MailChimp groups)

Sync is sent as a batch to MailChimp. Results may not appear in your MailChimp right away.
Currently, the list has 18 members

SYNC CONTACTS

Sync contacts



4. Click **SYNC CONTACTS**. The sync is sent as a batch to MailChimp. Results may not appear in MailChimp right away.

Mail Chimp Sync

MailChimp Group	Coreware Contacts
Mailing Lists->Newsletter	Mailing List 'Newsletter'
Mailing Lists->Memo	Mailing List 'Memo'
Categories->Staff	Contact Category 'Staff'
Categories->Donor	Contact Category 'Donor'
Designations->General Donation	Donors who gave toward 'General Donation'
Designations->Disaster Relief Donation	Donors who gave toward 'Disaster Relief Donation'
Designations->Community Service	Donors who gave toward 'Community Service'
Designations->Medical Outreach	Donors who gave toward 'Medical Outreach'
Designations->Back-to-School Drive	Donors who gave toward 'Back-to-School Drive'
Designations->Training Workshops	Donors who gave toward 'Training Workshops'
Designations->Other Donations	Donors who gave toward 'Other Donations'
Designation Groups->Corporate Gifts	Donors who gave toward designations in the designation group 'Corporate Gifts'
Designation Groups->Staff Support	Donors who gave toward designations in the designation group 'Staff Support'
Designation Groups->Daily Processings	Donors who gave toward designations in the designation group 'Daily Processings'
Designation Groups->No Fees	Donors who gave toward designations in the designation group 'No Fees'
User Groups->Admin	Users in the User Group 'Admin'
User Groups->Staff	Users in the User Group 'Staff'
User Groups->Donor	Users in the User Group 'Donor'

3 contacts skipped because of duplicate email addresses.

0 MailChimp members deleted.

0 errors occurred because of duplicate email addresses.

0 MailChimp members updated.

17 MailChimp members added.

Sync is sent as a batch to MailChimp. Results may not appear in your MailChimp right away.

Currently, the list has 2 members

SYNC CONTACTS

Sync results



5. Go to [MailChimp.com](https://mailchimp.com) and refresh the screen to see the updated mailing list.
6. **IMPORTANT** If you don't see the changes in MailChimp, try again after a few minutes. MailChimp queues up the import so please be patient.

View Saved Segments ▾

Create A Segment

▼	Email Address	First Name	Last Name	Mailing Lists	Categories	Designations	Designation Groups
<input type="checkbox"/>	Synced Contacts in MailChimp						
<input type="checkbox"/>	cj_russell@ydc.com >	Christine and James	Russell				
<input type="checkbox"/>	john.reese@gmail.com >	John	Reese	Newsletter			
<input type="checkbox"/>	sarah.moore@gmail.com >	Sarah	Moore		Donor	General Donation	Corporate Gifts
<input type="checkbox"/>	jonathan.walker@gmail.com >	Jonathan	Walker	Newsletter	Donor	General Donation, Other Donations	Corporate Gifts, Staff Supp
<input type="checkbox"/>	john.moore@gmail.com >	John	Moore	Newsletter	Donor	General Donation	Corporate Gifts
<input type="checkbox"/>	jillian.moore@gmail.com >	Jillian	Moore			General Donation	Corporate Gifts
<input type="checkbox"/>	jane@gmail.com >	Jane	Moore	Newsletter	Donor		
<input type="checkbox"/>	mary.baker@gmail.com >	Mary	Baker	Newsletter	Donor	General Donation, Disaster Relief Donation	Corporate Gifts
<input type="checkbox"/>	jack.faulkner@gmail.com >	Jacob	Faulkner		Donor	General Donation, Back-to-School Drive	Corporate Gifts

If you notice something missing or wrong in this page help, please file a ticket at <https://www.coreware.com/helpdesk>.