Maximizer Connect for use with MailChimp

Getting Started Guide

for Maximizer CRM Live
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This document applies to Maximizer Connect and Maximizer CRM Live software.
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Introduction

Maximizer Connect for use with MailChimp is a synchronization solution which supports two-way synchronization between your Maximizer Address Book and a selected MailChimp list. It facilitates integration between Maximizer and MailChimp by ensuring that contacts added to the selected list in MailChimp are synchronized with Maximizer and vice versa. It also allows you to view MailChimp campaign activity information for your contacts within Maximizer.

How to Use this Document

This document highlights the key features of Maximizer Connect for use with MailChimp and provides instructions for configuring Maximizer Connect. The information in this guide is intended to complement the main Maximizer documentation.

Maximizer Connect Overview

Maximizer Connect for use with MailChimp is an easy to use, powerful solution for synchronizing contact information between Maximizer and MailChimp and for viewing MailChimp campaign information within Maximizer.

When contacts are added to the selected list in MailChimp, Maximizer Connect automatically replicates those contacts in Maximizer. You may also select Maximizer contacts to synchronize from Maximizer to MailChimp and be added to your selected MailChimp list.

Contact information is kept up to date by synchronizing changes to Maximizer fields and MailChimp contact information, such as first name and last name.

Maximizer Connect also allows you to view MailChimp campaign activity information for your synchronized Maximizer contacts in the MailChimp following tab in Maximizer.

System Requirements

The system requirements for Maximizer Connect for use with MailChimp are listed below.

- **MailChimp Account** – Maximizer Connect requires a MailChimp account with at least one list set up in the account.
About Maximizer Connect

Maximizer Connect for use with MailChimp allows you to synchronize contact information between Maximizer and MailChimp, and to view information about MailChimp campaigns in Maximizer.

Some of the key features of Maximizer Connect are listed below:

- Contacts added to the synchronized list in MailChimp are automatically replicated in Maximizer as Individuals.
- Selected Individuals and Contacts in Maximizer are automatically replicated in MailChimp and are added to the synchronized MailChimp list.
- Changes to synchronized entries are automatically updated via the two-way synchronization mechanism of Maximizer Connect.
- Custom field mappings may be set up to synchronize additional fields between Maximizer Address Book entries and MailChimp contacts.
- Information about MailChimp contact history and campaign activities is displayed in the MailChimp following tab in Maximizer for synchronized Maximizer entries.

How Synchronization Works

Maximizer Connect for use with MailChimp runs as a background service and cycles periodically to ensure that your contact information in Maximizer and MailChimp is kept up to date.

Each time the service cycles, it compares the entries in the synchronized MailChimp list with their corresponding entries in Maximizer to determine if any entries have changed since the last synchronization cycle. If any changes have been made or if any new entries have been added, Maximizer Connect updates the corresponding entries to keep both sides in sync.
Synchronization Process

Synchronization between Maximizer and MailChimp operates in two directions: from MailChimp to Maximizer and from Maximizer to MailChimp.

Synchronization Criteria

The criteria listed below are used to determine which entries to synchronize between MailChimp and Maximizer.

**Synchronization from MailChimp to Maximizer**

All MailChimp contacts that subscribe to the selected list in MailChimp are automatically synchronized to Maximizer.

When a new contact is added to the synchronized list in MailChimp for the first time, the value of the **Sync to MailChimp** user-defined field for the matching contact in Maximizer is automatically set to **Yes** to ensure that the contact will be synchronized.

**Synchronization from Maximizer to MailChimp**

In order for a Maximizer Address Book entry to be synchronized from Maximizer to MailChimp, it must meet the criteria listed below.

- **Sync to MailChimp** – In order for a Maximizer entry to be synchronized to MailChimp, the value of the **Sync to MailChimp** user-defined fields must be set to **Yes**. This is a Yes/No user-defined field that is created during the initial configuration of Maximizer Connect and is available only for individual and contact entries.

- **Email 1** – Contacts and individuals in Maximizer must have a value in the first email field in order to be synchronized to MailChimp. Even if the **Sync to MailChimp** user-defined field is set to **Yes**, the entry will not synchronize if the first email field is blank.

When an entry is found that matches the above criteria, the entry is synchronized to MailChimp.

Matching Criteria

When synchronizing contacts between MailChimp and Maximizer, the synchronization service will look for matching entries using the criteria listed below in the following order:

- **MailChimp ID** – This is the ID associated with a contact in MailChimp. This value is stored in the **MailChimp ID** user-defined field.
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defined field in Maximizer that is created during the initial configuration of Maximizer Connect.

- **Client ID/Contact Number** – This is the ID associated with an entry in Maximizer. Only MailChimp contacts that have already been synchronized with Maximizer will have values in these fields.

- **Email Address** – This is the email address of the contact in MailChimp. If no entries matching the above criteria are found, the synchronization service will look for an entry with a matching email address in the first email field in Maximizer.

If a matching entry is found using the above criteria, the existing contact is updated, otherwise a new entry is created.

Synchronization Rules

The rules outlined below are used to determine how entries are created and updated when synchronizing contacts between MailChimp and Maximizer.

**Synchronization from MailChimp to Maximizer**

When synchronizing a new contact from MailChimp to Maximizer, the contact is created as an Individual in Maximizer. MailChimp contact properties are synchronized to the new Maximizer entry as basic fields and user-defined fields.

When updating an existing entry in Maximizer, changes to user-defined fields are updated in the Maximizer entry, however changes to basic fields are not updated to avoid inadvertently overwriting Maximizer client data.

If the email address of a synchronized MailChimp contact is changed, a new entry will be created for the contact in Maximizer. If the Sync to MailChimp user-defined field for the original entry in Maximizer is still set to Yes, a new MailChimp contact with the original email address is created in MailChimp.

If a MailChimp contact that had previously been synchronized to Maximizer is deleted, the entry is not deleted from Maximizer. Instead, the Sync to MailChimp user-defined field for that entry is set to No on the next synchronization cycle following a change to the Maximizer entry, and the entry is no longer synchronized.

**Synchronization from Maximizer to MailChimp**

When synchronizing an entry from Maximizer to MailChimp for the first time, if an existing contact with a matching email address already exists in MailChimp, the existing contact will be updated with
the contact information from the Maximizer entry. This may result in the MailChimp contact information being overwritten.

If a Maximizer entry that had previously been synchronized to MailChimp is deleted, the contact is not deleted from MailChimp. Instead, the entry is recreated in Maximizer on the next synchronization cycle following a change to the MailChimp contact, as all MailChimp contacts in the list must always have a corresponding Maximizer entry.
MailChimp Following Tab

The MailChimp following tab in the Address Book page provides access to the Maximizer Connect configuration settings and allows you to view information about MailChimp contacts from within Maximizer.

View MailChimp Information for an Entry

Before performing this procedure you must select your MailChimp list for synchronization.

You can view MailChimp information for any Maximizer entry that is synchronized to MailChimp. The information that is displayed includes the contact’s rating, subscription information, and information about campaign activities in MailChimp.

1. In the Address Book page, select an entry that is synchronized with MailChimp.

2. Select the MailChimp following tab.

The information for the synchronized entry is displayed in the following tab.
View an Entry in MailChimp

Before performing this procedure you must select your MailChimp list for synchronization.

You can view the MailChimp contact that is linked to any Maximizer entry that is synchronized to MailChimp.

1. In the Address Book page, select the MailChimp following tab.
2. Click the View details in MailChimp link.

The synchronized contact in MailChimp opens in a new browser window.
Setting Up Maximizer Connect

The Maximizer Connect setup and configuration process consists of the following:

- **Maximizer User-Defined Fields Configuration** – Create the Maximizer user-defined fields that are used by Maximizer Connect.

- **Connect Your MailChimp Account** – Configure the connection to your MailChimp account by entering your MailChimp API Key.

- **Create the MailChimp Sync User** – Create a Maximizer user account for use by Maximizer Connect and configure the Sync Service User credentials.

- **Maximizer Connect Configuration** – To synchronize your MailChimp contacts, you must select a MailChimp list and map the fields that you want to synchronize.

Once each of the required configuration steps have been performed, synchronization will begin automatically at the next scheduled sync interval.

Maximizer User-Defined Fields Configuration

Before configuring the Maximizer Connect settings, you must create some new user-defined fields in Maximizer that are used by Maximizer Connect during the synchronization process.

Maximizer Connect creates the required fields for you automatically the first time you open the Maximizer Connect Setup dialog in the MailChimp following tab.

Create User-Defined Fields in Maximizer

To perform this procedure, you must have Insert permissions for User-defined field setup.

If the required user-defined fields do not exist in your Address Book, the MailChimp following tab will display an error message and allow you to create the fields automatically.

1. In the Address Book page, select the **MailChimp** following tab. An error message is displayed to indicate that the required user-defined fields do not exist.
2 Click the **Maximizer Connect Setup** link.

The required user-defined fields are created automatically, and the Maximizer Connect Setup dialog opens.

Maximizer User-Defined Fields

The user-defined fields required by the Maximizer Connect service are listed below. All of the user-defined fields listed here must exist in order to use the MailChimp following tab and for synchronization to complete without errors.

**Folder: MailChimp**

The user-defined fields in this folder should be available only for Individual and Contact Address Book entries, and not for Companies.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sync with MailChimp</td>
<td>Yes/No</td>
<td>If the value of this field is Yes then the Maximizer entry will be synchronized to MailChimp.</td>
</tr>
<tr>
<td>MailChimp ID</td>
<td>Alphanumeric</td>
<td>This field contains the MailChimp ID of the contact and is used when matching MailChimp contacts with their corresponding entries in Maximizer. Full access to this field should be restricted so as to prevent users from inadvertently changing the value of the field. It has a maximum length of 29 characters.</td>
</tr>
</tbody>
</table>

Connect Your MailChimp Account

In order for Maximizer Connect to synchronize your MailChimp contact information with Maximizer, you must link your MailChimp account to Maximizer.

Enter MailChimp API Key

Refer to your MailChimp documentation for more information on how to create and manage your MailChimp API keys.

To connect Maximizer Connect with your MailChimp account, you must enter your MailChimp API key. You can generate an API key for your MailChimp account in the Account > Extras > API Keys screen in your MailChimp account.
1. In the Address Book page, select the **MailChimp** following tab.

2. Click the **Maximizer Connect Setup** link.
   The Maximizer Connect Setup dialog opens.

3. Enter your **MailChimp API key** and click **Connect**.

Maximizer Connect connects to the MailChimp servers to validate your API key. If validation is successful, summary information about your account is displayed.

**Configure Sync Service User**

Maximizer Connect requires a Maximizer user account to use when accessing your Maximizer Address Book data during synchronization with MailChimp.

The selected Maximizer user must have Full access to all Address Book entries, user-defined fields, and user-defined fields setup in Maximizer, and must be enabled for Service access.

Creating a dedicated Maximizer user account that is used only for MailChimp synchronization and is not used to log in to Maximizer will enable you to identify changes made by Maximizer Connect. By inspecting the Created by and Last Modified by fields for your entries you can tell which entries were last updated by the MailChimp sync. If you have enabled the Auditing feature for Address Book entries in Administrator, you will also be able to see a history of the changes made by Maximizer Connect in the Auditing tab and System Audit Report.
If the Maximizer user created for Maximizer Connect is enabled for Service access but is disabled for Web access, it will not consume a user license.

Create Sync Service User

In order to perform this procedure, you must have the Administrator role in Maximizer.

You can create a new user account for use by Maximizer Connect in Administrator. To log in to Administrator, hover your mouse over the Administration menu in Maximizer and select Administrator.

1. In the left pane, click Users.
   The list of users is displayed.

2. Click Add.
   The Copy User’s Properties dialog box opens.

3. Click OK.

4. In the General tab, fill in the basic information for the user.
   - Enter a unique User ID for the user. Make a note of the User ID you choose, as you will need it later to configure the Sync Service User.
   - Enter a Last name and Display name for the user. The Display name will appear in the Created by and Last Modified by fields for synchronized entries, so you should enter a display name that you will recognize as belonging to the Maximizer Connect user.
   - Enter an Email address for the user. You should enter a valid email address, as a validation email will be sent after the user is created.
   - Under Module login, ensure Enabled is selected for Service access and Disabled is selected for Web access.

5. Select the Access Rights tab.

6. Click Modify User Access Settings to set the access settings for the user.
   - Under Permissions, ensure that Read, Insert, Modify, and Delete permissions are granted for Address Book, User-defined fields, and User-defined field setup.
   - Under Privileges, ensure Modify other users’ private entries is checked.

7. Click Save Settings.
8 Click **Save**.

The user is created and a new user activation email is sent to the email address you entered for the user. As you will not be using this user to log in to Maximizer, you can ignore the email.

9 Select the user in the list and click **Password**.

The Change user’s password page opens.

10 Enter and confirm the new password for the user.

Make a note of the password you entered, as you will need it to configure the Sync Service User.

11 Click **Save**.

---

**Edit Sync Service User**

*Before performing this procedure you must enter your MailChimp API key in the Connection tab of the Maximizer Connect Setup dialog.*

Before synchronization with MailChimp can begin, you must configure the Sync Service User. After configuring the Sync Service User for the first time, Maximizer Connect synchronization will begin at the next scheduled sync interval.

1 In the Address Book page, select the **MailChimp** following tab.

2 Click the **Maximizer Connect Setup** link.

The Maximizer Connect Setup dialog opens.

3 Select the **Configuration** tab.

4 Click the **Edit Sync Service User** button

The Edit Sync Service User dialog opens.

5 Enter the **User ID** and **Password** of the dedicated user that you created.

6 Click **OK**.
Maximizer Connect Configuration

Before using Maximizer Connect you must configure your synchronization settings.

Select MailChimp Synchronization List

Before performing this procedure you must enter your MailChimp API key in the Connection tab of the Maximizer Connect Setup dialog.

In order to synchronize your contacts between Maximizer and MailChimp, you must select a MailChimp List to synchronize with.

1. In the Address Book page, select the MailChimp following tab.
2. Click the Maximizer Connect Setup link.
   The Maximizer Connect Setup dialog opens.
3. Select the Configuration tab.
4. Click the Select a Sync List link.

The lists available for synchronization in your MailChimp account are displayed.

If you have already selected a list for synchronization and you change the selected list, any field mappings that you have set up will be lost.
Select a synchronization list from the available MailChimp lists and click OK.

Click Yes.

After Completing This Task:
- Enable Interest Groups for the synchronized MailChimp list. See “Enable Groups for Synchronized MailChimp List” on page 15.
- Set up custom field mappings to synchronize additional fields between Maximizer and MailChimp.
- Perform an initial synchronization to synchronize all entries in your list using the Sync Entire List function.

Enable Groups for Synchronized MailChimp List

Before synchronizing your selected MailChimp list for the first time, you must enable Interest Groups by creating one or more Groups for the list.

You can configure your Groups however you’d like to segment your list. For example, you could create a Group called “Email Profile” with options displayed as checkboxes that you could map to the Email Opt-In Type field in Maximizer, allowing you to segment the
subscribers in your MailChimp list based on their email opt-in preferences in Maximizer.

For more information about how to set up Groups in MailChimp, refer to the MailChimp help documentation.

1 Log in to your MailChimp account and navigate to the Lists page.

2 Select the list that you have configured as your selected synchronization list.

3 From the Manage subscribers drop-down menu, select Groups.

4 Select Create Groups.

5 Choose the way you would like the group options to be displayed on your signup form.
   If you don’t want to display these options on your signup form, select the Don’t show these groups on my signup form option.

6 Enter a title for the group in the Group title field.

7 Under Group names, enter as many options as you’d like to use for segmenting your list.
   If you plan to map this Group field to an existing field in Maximizer, you should enter Group names that correspond to the available values in the Maximizer field.

8 Click Save.

Configure Field Mappings

Before performing this procedure you must select your MailChimp list for synchronization.

By default, Maximizer Connect synchronizes the First Name, Last Name, and Email Address fields between MailChimp and Maximizer. If you would like to synchronize additional fields, you can do so by setting up custom field mappings using the procedure below.

1 In the Address Book page, select the MailChimp following tab.

2 Click the Maximizer Connect Setup link.
   The Maximizer Connect Setup dialog opens.

3 Select the Configuration tab.

4 Click the Map Fields link.
The Field Mapping dialog opens.

5. Click **Add Field** next to the MailChimp field that you want to add a mapping for.
   - or –
   Click **Modify** next to a MailChimp field that is already mapped to change the mapping.
   - or –
   Click **Remove** next to a MailChimp field that is already mapped to remove the mapping.

6. Select the Maximizer field to map the selected MailChimp field to and click **Select**.

7. Click **OK**.
Supported Field Mappings

Maximizer Connect only supports synchronization between certain field types. When setting up the field mappings for your MailChimp fields, the list of Maximizer fields is filtered so that only compatible fields are available for selection.

Each of the MailChimp field types and the supported Maximizer field types that they may be mapped to are listed below.

If, after setting up your field mappings, you change the type of a mapped field in Maximizer, synchronization for that field will fail. For example, if you change a multi-value table field to a single-value table field, or vice-versa, the field will no longer sync.

MailChimp Field Types

- **Group** – MailChimp Groups can only be mapped to multi-value table fields in Maximizer.
- **Check Boxes** – Can only be mapped to multi-value table fields in Maximizer.
- **Text** – Can only be mapped to alphanumeric fields in Maximizer.
  If a Text field in MailChimp is mandatory but the mapped field in Maximizer does not have a value, a value of “-” is set for the field.
- **Number** – Can only be mapped to numeric fields in Maximizer.
  If a Number field in MailChimp is mandatory but the mapped field in Maximizer does not have a value, a value of “0” is set for the field.
- **Radio Buttons** – Can only be mapped to single-value table fields in Maximizer.
  If a Radio Buttons field in MailChimp is mandatory but the mapped field in Maximizer does not have a value, the first item is selected.
- **Drop Down** – Can only be mapped to single-value table fields in Maximizer.
  If a Drop Down field in MailChimp is mandatory but the mapped field in Maximizer does not have a value, the first item is selected.
- **Date** – Can only be mapped to date fields in Maximizer.
  If a Date field in MailChimp is mandatory but the mapped field in Maximizer does not have a value, the field is set to the current date.
- **Birthday** – Can only be mapped to date fields in Maximizer.
  When synchronizing the value in a Birthday field from MailChimp to Maximizer, the current year is added to the date.
automatically. To prevent the current year from being added 
Birthday fields synchronized from MailChimp, you can select a 
Date user-defined field with the “Annually recurring event” 
option and without the “Retain year” option as the mapped 
field in Maximizer.

If a Birthday field in MailChimp is mandatory but the mapped 
field in Maximizer does not have a value, the field is set to the 
current date.

- **Address** – Can only be mapped to alphanumeric fields in 
Maximizer. Typically the MailChimp Address fields, such as Street 
Address, City, and Postal/Zip should be mapped to the 
corresponding basic field in Maximizer.

If an Address field in MailChimp is mandatory but the mapped 
field in Maximizer does not have a value, a value of “-” is set for 
the field.

- **Zip Code** – Can only be mapped to alphanumeric fields in 
Maximizer. Typically the MailChimp Postal/Zip field should be 
mapped to the ZipCode basic field in Maximizer.

If a Zip Code field in MailChimp is mandatory but the mapped 
field in Maximizer does not have a value, a value of “10000” is 
set for the field.

- **Phone** – Can only be mapped to alphanumeric fields in 
Maximizer. Typically the Phone Number field in MailChimp 
should be mapped to the Phone basic field in Maximizer.

When synchronizing a value from Maximizer to a Phone field in 
MailChimp, if an invalid phone number format is detected, 
Maximizer Connect will try to convert the value to make it valid.

If a Phone field in MailChimp is mandatory but the mapped 
field in Maximizer does not have a value, a value of “-” is set for the 
field.

- **Website** – Can only be mapped to alphanumeric fields in 
Maximizer. Typically the Website field in MailChimp should be 
mapped to the Web Site basic field in Maximizer.

If a Text field in MailChimp is mandatory but the mapped field in 
Maximizer does not have a value, a value of “http://www.google.com” is set for the field.

- **Image** – Can only be mapped to alphanumeric fields in 
Maximizer.

If a Text field in MailChimp is mandatory but the mapped field in 
Maximizer does not have a value, a value of “http://www.google.com” is set for the field.
Configure Sync Frequency

*Before performing this procedure you must select your MailChimp list for synchronization.*

You can specify the frequency at which the Maximizer Connect synchronization service will run. The default synchronization frequency is once every hour.

1. In the Address Book page, select the **MailChimp** following tab.
2. Click the **Maximizer Connect Setup** link.
   The Maximizer Connect Setup dialog opens.
3. Select the **Configuration** tab.
4. Click the **Edit Sync Settings** link.
   The Edit Sync Settings dialog opens.
5. Select the desired synchronization frequency in the **Sync every** drop-down menu.
6. Click **OK**.

---

**Maximizer Connect Setup**

**Edit Sync Settings**

**Sync frequency**
Sync frequency determines how often the entries will be synced between Maximizer and MailChimp.

**Sync every:**

- [ ] 1 hour

**Conflict resolution**
Determine how to handle synchronization conflicts between MailChimp and Maximizer. Conflicts may occur in one of the following situations:
- If matching entries are found in both MailChimp and Maximizer during initial sync
- If an entry that already exists in Maximizer but has not been synchronized is added to the MailChimp list
- If a new field is added to the field mapping, or if a mapped field is changed from one field to another

- **Maximizer overrides**
- **MailChimp overrides**

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**OK**  **Cancel**
Configure Conflict Resolution

Before performing this procedure you must select your MailChimp list for synchronization.

When you synchronize a field between Maximizer and MailChimp for the first time, a conflict will occur if the entry exists in both Maximizer and MailChimp and if the field has a value for the matching entry in both Maximizer and MailChimp.

Conflicts may occur in the following cases:

- During the initial sync of your MailChimp list if matching contacts are found in both MailChimp and Maximizer.
- If an entry that already exists in Maximizer but has not been synchronized with MailChimp is added to your MailChimp list.
- If you add a new field to your field mapping, or if you change a field mapping from one field to another.

Maximizer Connect allows you to choose how to resolve these conflicts by specifying whether to use the Maximizer value or the MailChimp value in the case of a conflict when synchronizing a field for the first time.

1. In the Address Book page, select the MailChimp following tab.
2. Click the Maximizer Connect Setup link.
   The Maximizer Connect Setup dialog opens.
3. Select the Configuration tab.
4. Click the Edit Sync Settings link.
   The Edit Sync Settings dialog opens.
5. Select the Conflict resolution option you wish to use to decide which value to retain if a conflict occurs when synchronizing a field for the first time.
   - Select Maximizer overrides to keep the Maximizer value.
   - Select MailChimp overrides to keep the MailChimp value.
6. Click OK.

Sync Entire List

Before performing this procedure you must select your MailChimp list for synchronization.

You can use this procedure to perform an initial synchronization after setting up Maximizer Connect for the first time, or when selecting a new MailChimp list for synchronization.
When you select this option, the Maximizer Connect service will perform a complete synchronization of all entries in the selected MailChimp list and all Maximizer entries with the Sync to MailChimp user-defined field selected at the next synchronization cycle.

1. In the Address Book page, select the MailChimp following tab.
2. Click the Maximizer Connect Setup link.
   The Maximizer Connect Setup dialog opens.
3. Select the Configuration tab.
4. Click the Sync Entire List link.
5. Click Yes.