Maximizer Connect for use with MailChimp

Getting Started Guide

Notice of Copyright

Registered Trademarks and Proprietary Names

Applicability

This document applies to Maximizer Connect 1.2.

Maximizer Software Address Information

Americas (Head Office)

Maximizer Services Inc.

+1 604 601 8000 phone
+1 604 601 8001 fax
+1 888 745 4645 support

info@maximizer.com
www.maximizer.com

Europe, Middle East, and Africa

Maximizer Software Ltd

+44 (0) 1344 766 900 phone

enquiries@maximizer.com
www.maximizer.com/uk

Australia/New Zealand

Maximizer Software Solutions Pty. Ltd.

+61 (0)2 9957 2011 phone
info.anz@maximizer.com
www.maximizer.com/au

Contents

Maximizer Connect for use with MailChimp

In this chapter...

Introduction

Maximizer Connect for use with MailChimp is a synchronization solution which supports two-way synchronization between 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 installing and 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.

- **Maximizer CRM 2015 R2 or Maximizer CRM 2016 –** Maximizer Connect requires Maximizer CRM 2015 R2 or Maximizer CRM 2016 Group or Enterprise Edition to be installed.

- **Maximizer Components for Microsoft IIS –** Maximizer Web Access and the Maximizer.Web.Data service, which are included in the Maximizer Components for Microsoft IIS, must be installed.

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

- **Operating System –** Maximizer Connect requires Windows Server 2008 R2, 2012, or 2012 R2.

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.

(i) If an entry is found with the Sync to MailChimp user-defined field set to Yes, but without an email address, the entry will not be synchronized.

- **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 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

After a contact is synchronized
from MailChimp to Maximizer,
the entry may be converted
from an individual to a contact
and synchronization will
continue as normal.

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.

To prevent entries from being
recreated in MailChimp
unnecessarily, it is best to
update the email address for
synchronized contacts in
Maximizer rather than in
MailChimp.

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.

The MailChimp tab is installed with the Configuration Web Application for Maximizer Connect.

View MailChimp Information for an Entry

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

ⓘ The Service access module login setting is only available in Maximizer CRM 2016 and later. If you are using Maximizer CRM 2015 R2, the sync service user must be enabled for Web Access.

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.
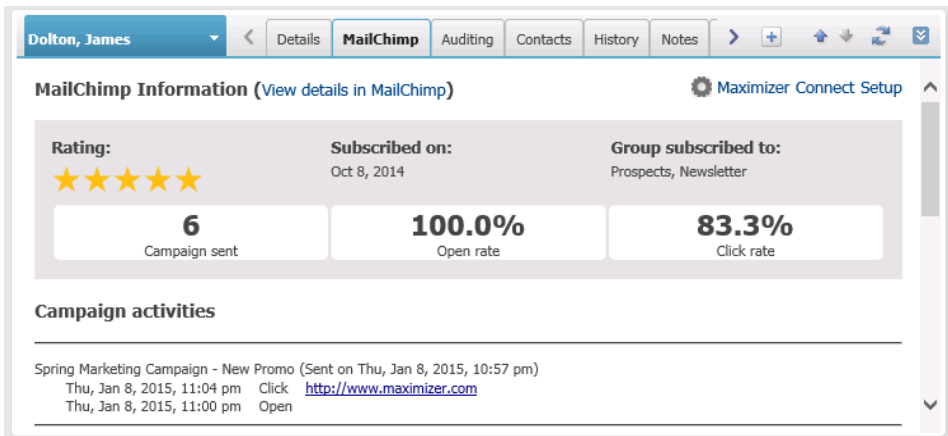
View an Entry in MailChimp

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 Connect Installation –** Install the Maximizer Connect Windows service and Configuration Web Application for Maximizer Connect.

- **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.

- **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, you must start the Maximizer Connect service to enable synchronization.

Maximizer Connect Installation

The Maximizer Connect for use with MailChimp installation package includes two components:

The Maximizer Connect Windows Service should not be installed on more than one server when synchronizing with a single Address Book or duplicate entries will result.

- The Maximizer Connect Windows Service, which runs as a background service to synchronize data between Maximizer and MailChimp.

- The Configuration Web Application for Maximizer Connect, which installs a following tab in Maximizer Web Access that allows you to configure the Maximizer Connect and to view MailChimp information for your Maximizer entries.

These components may be installed on the same server or on different servers. However, the Configuration Web Application for Maximizer Connect must be installed on the same server where Maximizer Web Access is installed.

Once you have completed the setup of both components, and have completed the Maximizer and MailChimp configuration, you must restart the server where the Maximizer Connect Windows Service is installed in order to start the service and for the changes to take effect.

Maximizer User for Synchronization Service

Maximizer Connect requires a dedicated Maximizer user to be used by the synchronization service.

The service user should be used solely by the Maximizer Connect service, and should not be used to log in to Maximizer for any other reason. To prevent the user from logging in to Maximizer, the dedicated user should be enabled for Service Access but should be disabled for all other access methods.

ⓘ The Service access module login setting is only available in Maximizer CRM 2016 and later. If you are using Maximizer CRM 2015 R2, the sync service user must be enabled for Web Access.

The service user must have the permissions listed below. If the user does not have sufficient permissions, it will result in errors during synchronization.

- **Address Book Entry Permissions –** The user must have Read, Insert, and Modify permissions for Address Book entries.
- **User-Defined Fields Permissions –** The user must have Read, Insert, Modify, and Delete permissions for User-Defined Fields.
- **Access to Address Book Entries –** The user must have Full access to all Address Book entries that are synchronized by the service.
- **Access to User-Defined Fields –** The user must have Full access to all of the user-defined fields required by the service, as well as any user-defined fields specified by a custom mapping.

Prior to installing the Maximizer Connect Windows Service you must have the user's credentials available, as they are required to complete the setup of the service.

Create Sync Service User

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

You must use Maximizer Web Access Administrator to create the sync service user, as the Service Access module login setting is not available in Maximizer Windows Access Administrator.

ⓘ If the Maximizer Connect user is enabled for Service access only, it will not consume a Maximizer user license.

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

- 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**.

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**.

> **ⓘ** The Service access module login setting is only available in Maximizer CRM 2016 and later. If you are using Maximizer CRM 2015 R2, the sync service user must be enabled for Web Access.

Install Maximizer Connect

You must install Maximizer CRM Server Group or Enterprise Edition before you install Maximizer Connect.

Follow the instructions below to install the Maximizer Connect Windows service and Maximizer Connect Setup web application.

You may choose to install these components on the same server or on separate servers. If you choose to install these components on separate servers, you should install the Maximizer Connect Windows Service first.

1 Double-click the **MCIInstaller.msi** file to open it.

The Maximizer Connect for use with MailChimp setup wizard opens.

2 Click **Next**.

3 Accept the license terms and click **Next**.

4 Select the **Maximizer Connect Windows Service** and **Configuration Web Application for Maximizer Connect** checkboxes to install both Maximizer Connect components, and click **Next**.

You may choose to install the Windows service and configuration web application on separate servers by selecting only one or the other option on this screen.

(i) The Configuration Web Application for Maximizer Connect must be installed on the server where the Maximizer Components for Microsoft IIS are installed.
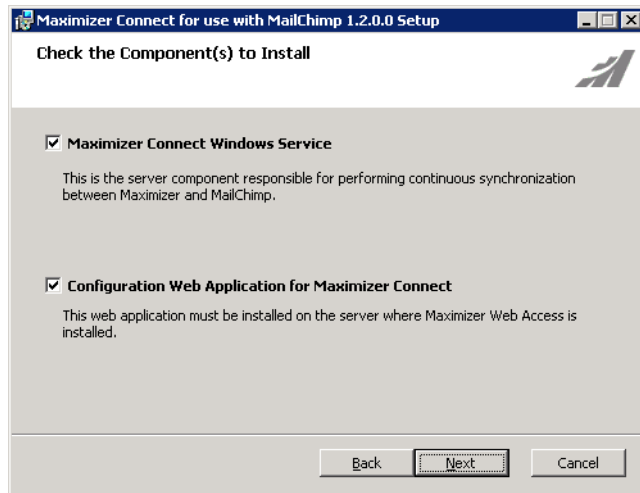
5 Enter your server information and click **Next**.

Keep the following points in mind when filling in the values for these fields:

(i) Ensure that you enter the same URL that you use to log in to Web Access, and do not enter a URL that is only locally accessible, like "localhost".

- The **Address Book Name** field should contain the database name of the Maximizer Address Book that you want to synchronize with MailChimp.

- The **Maximizer Web Access URL** is the address of Maximizer Web Access, and should look like the following: **https://[servername]/MaximizerWebAccess** where **[servername]** is the address where the Maximizer Components for Microsoft IIS are installed.

- The **Maximizer.Web.Data URL** is the address of the Maximizer.Web.Data service on your Maximizer Web Access server, and should look like the following: **https://**

[servername]/MaximizerWebData/Data.svc where **[servername]** is the address of your Maximizer Web Access server.
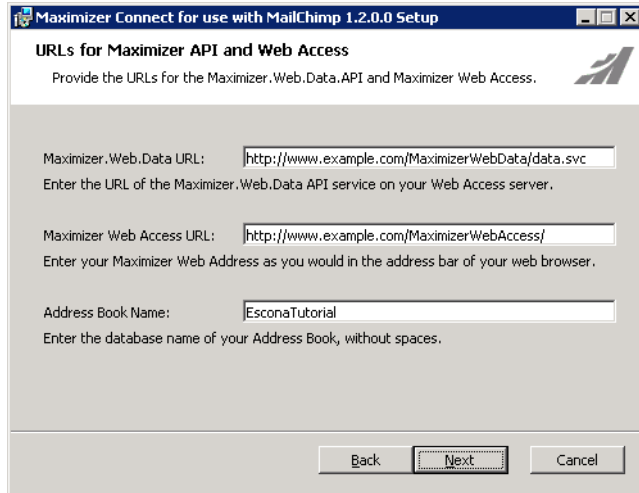
6 Specify the setup path for the Maximizer Connect Windows Service, and click **Next**.
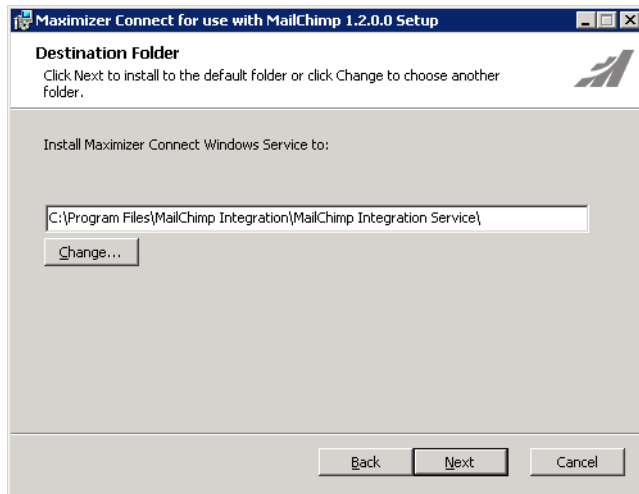
7 Enter the details for the **User ID** and **Password**, and click **Next**.

The **User ID** and **Password** fields should contain the credentials of a Maximizer user with Full access to all entries in the synchronized Address Book.

8 Select the **WebSite** in Microsoft Internet Information Service (IIS) in which to install the Configuration Web Application for Maximizer Connect, and click **Next**.

This step only applies if you selected the option to install the Configuration Web Application for Maximizer Connect component.

ⓘ You must install the Configuration Web Application for Maximizer Connect to the same website as Web Access.

9 Click **Install** to begin the installation.

10 Click **Finish** to complete the setup.

Maximizer User-Defined Fields Configuration

Before configuring the Maximizer Connect settings and starting the Maximizer Connect Windows Service for the first time, 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.

Field Name	Type	Description
Sync with MailChimp	Yes/No	If the value of this field is Yes then the Maximizer entry will be synchronized to MailChimp.
MailChimp ID	Alphanumeric	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.

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

Before performing this procedure you must install the Configuration Web Application for Maximizer Connect.

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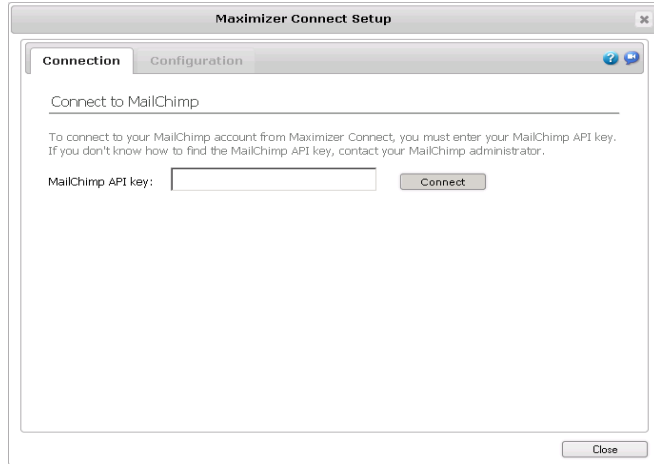
Maximizer Connect connects to the MailChimp servers to validate your API key. If validation is successful, summary information about your account is displayed.

Maximizer Connect Configuration

Before starting the Maximizer Connect service 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. Maximizer Connect only allows synchronization between a single Maximizer Address Book and MailChimp List.

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.

ⓘ 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.

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

Maximizer Connect Setup   ✖

Select a Sync List
───

Available MailChimp lists:

MailChimp List 1 - My MailChimp List (11 subscribers)

MailChimp List 2 - Monthly Newsletter (Jin) (11 subscribers)

MailChimp List 3 - MailChimp Escona Tutorial (8 subscribers)

                                                    OK   Cancel

---
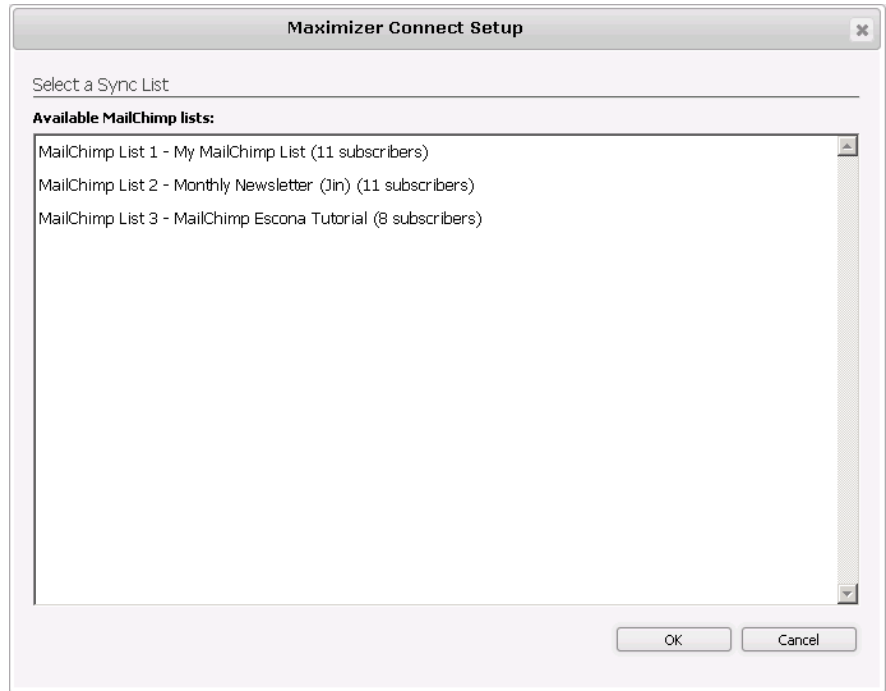
5 Select a synchronization list from the available MailChimp lists and click **OK**.

6 Click **Yes**.

After Completing This Task:

- Enable Interest Groups for the synchronized MailChimp list. See "Enable Groups for Synchronized MailChimp List" on page 20.

- 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.

🛈 Any time you change your synchronized list, you must also ensure that the new list has Interest Groups enabled.

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.

ⓘ The Service access module login setting is only available in Maximizer CRM 2016 and later. If you are using Maximizer CRM 2015 R2, the sync service user must be enabled for Web Access.

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**.
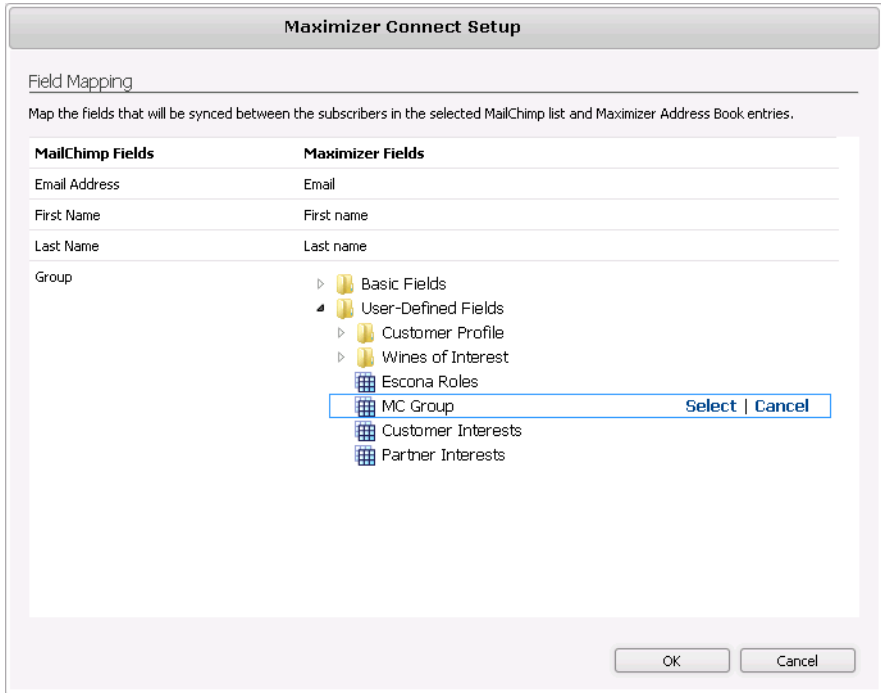
Supported Field Mappings

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.

The Service access module login setting is only available in Maximizer CRM 2016 and later. If you are using Maximizer CRM 2015 R2, the sync service user must be enabled for Web Access.

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**.

Configure Conflict Resolution

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

🛈 The Service access module login setting is only available in Maximizer CRM 2016 and later. If you are using Maximizer CRM 2015 R2, the sync service user must be enabled for Web Access.

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.

ⓘ The Service access module login setting is only available in Maximizer CRM 2016 and later. If you are using Maximizer CRM 2015 R2, the sync service user must be enabled for Web Access.

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**.

Start Synchronization

After installing and configuring Maximizer Connect, you must start the synchronization service in order to initiate synchronization between Maximizer and MailChimp.

You can start the service by restarting the server where the Maximizer Connect synchronization service is installed, or by starting the service directly in Windows Server Manager.

Start the Maximizer Connect Synchronization Service

Before performing this procedure you must install and configure Maximizer Connect.

You must be logged-in as an Administrator to perform this procedure.

1 Open Windows Server Manager.

2 Select **Configuration > Services**.

3 Select **Maximizer MailChimp Integration Service** in the list of services.

4 Click **Start**.

Troubleshooting

This section contains information about how to correct possible problems encountered when using Maximizer Connect.

Required User-Defined Fields Not Created

Problem

If the user-defined fields required by Maximizer Connect do not exist in the synchronized Address Book, synchronization fails and the MailChimp following tab displays an error message to indicate that the fields do not exist.

Solution

To resolve this problem, create the required user-defined fields in the MailChimp following tab. See "Create User-Defined Fields in Maximizer" on page 16.

Alternatively, the Maximizer Connect for use with MailChimp installation includes a Maximizer XML Interface (MXI) file containing the user-defined field definitions which you can import manually in Administrator to create the user-defined fields.

Import User-Defined Fields in Administrator

*Back up your Maximizer Address Book before performing this procedure.*

The Maximizer Connect for use with MailChimp installation includes a Maximizer XML Interface (MXI) file which contains the user-defined field definitions for all required user-defined fields used by Maximizer Connect.

By importing the included MailChimp_Connector_UDF_setup.MXI file using the Advanced Import feature in Maximizer Administrator, all of the required user-defined fields will be created automatically.

1 In Administrator, click **File > Import > Advanced Import**.

2 Next to the **Filename** field, click **Browse** and locate the MXI file to import.

The MailChimp_Connector_UDF_setup.MXI file is located in the "%PROGRAMFILES%\MailChimp" Integration folder on the server where the Maximizer Connect Windows Service is installed.
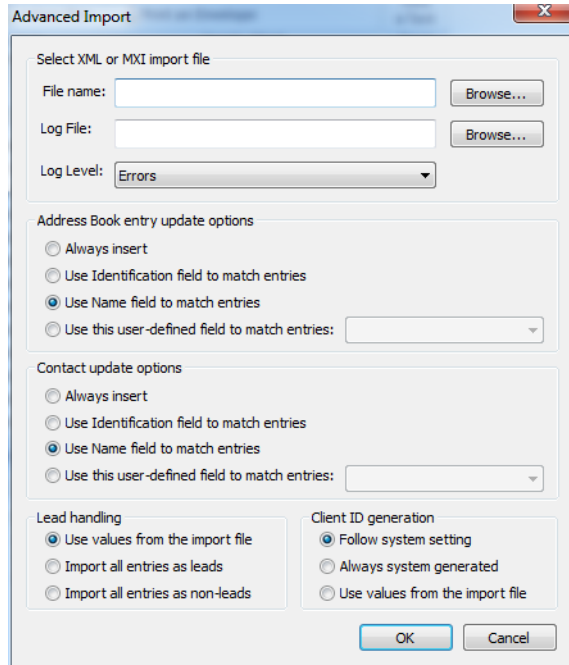
3 Click **OK** to begin the import.

Maximizer imports the user-defined field definitions and displays summary information about the import.

4 Click **OK** to close the message box.

Interest Groups not Enabled

Problem

If no Groups have been created for the synchronized MailChimp list, synchronization fails and the following error is reported in the log: "This list does not have interest groups enabled."

Solution

To resolve this problem, add one or more Groups to the synchronized list. See "Enable Groups for Synchronized MailChimp List" on page 20.

MailChimp Field Mapped to Invalid Maximizer Field Type

Problem

If a MailChimp field is mapped to an invalid field type in Maximizer, for example, if a MailChimp Group is mapped to a single-value table user-defined field, synchronization of the field fails.

This can happen if you set up your field mappings to a valid field, and then later change the type of the field in Maximizer. When this happens, an error is reported in the log indicating the cause of the error, for example, "Lead Status should be mapped to single-value table field."

Solution

To resolve this issue you must either change the type of the existing mapped field in Maximizer back to a valid field type, or you must re-map the MailChimp field to a valid Maximizer field.

Wrong Address Book Configured for Synchronization

Problem

If the wrong Address Book is configured for synchronization, an error message is displayed in the MailChimp following tab.

Solution

The Address Book configured for synchronization may be changed in one of two ways:

- Uninstall and re-install Maximizer Connect for use with MailChimp and select the correct Address Book (recommended).
- Manually edit the configuration files for the MailChimp following tab and synchronization service.

Change the Synchronized Address Book

You can change the synchronized Address Book for Maximizer Connect by editing the configuration files for the MailChimp following tab and the synchronization service.

1 Stop the Maximizer MailChimp Integration Service and log out of all active Maximizer Web Access sessions.

2 Open the **MailChimpIntegrationService.exe.config** service configuration file in a text editor.

By default this file is located in the following folder: "%PROGRAMFILES%\MailChimp Integration\MailChimp Integration Service"

3 Update the value of the **MaximizerDBName** setting with the database name of the Address Book to synchronize, for example:

<add key="MaximizerDBName" value="EsconaTutorial"/>

4 If necessary, update the values of the **MaximizerDBLogin** and **MaximizerDBPassword** settings with the username and password of the synchronization user.

5 Open the **Web.config** MailChimp following tab configuration file in a text editor.

By default this file is located in the following folder: "%PROGRAMFILES%\MailChimp Integration\MailChimp Integration Service\mailChimpTab"

6 Update the value of the **SynchronizedMaximizerDatabase** setting with the database name of the Address Book to synchronize, for example:

<add key="SynchronizedMaximizerDatabase" value="EsconaTutorial"/>

This value must be identical to the MaximizerDBName setting in the service configuration file.

7 Save the changes to both configuration files.

8 Restart the Maximizer MailChimp Integration Service.

System Clocks Out of Sync

Problem

If the system clock of the server where the Maximizer Connect Synchronization Service is running is out of sync with the system

clock on the MailChimp server, it could result in changes not being synchronized successfully from Maximizer to MailChimp or vice versa.

Solution

The recommended way to avoid this problem is to ensure that your Maximizer Connect server's clock is in sync with the MailChimp server by using an NTP server to set the system time on your server.

If it is not possible to keep the Maximizer Connect server's system clock in sync with the MailChimp server clock, additional synchronization buffer time may be added.

The synchronization buffer time is an additional timespan that is added when searching for changes to synchronize between Maximizer and MailChimp in order to account for differences between the server clocks.

Note that setting the synchronization buffer time to a large value may cause changes to synchronize back and forth between Maximizer and MailChimp more times than are necessary and cause additional load on your server. You should use a synchronization buffer time only slightly longer than the largest expected time difference between the two servers. Never set the synchronization buffer time to be longer than the synchronization interval duration.

Change the Synchronization Buffer Time

You can change the synchronization buffer time for Maximizer Connect by editing the configuration file of synchronization service.

1 Stop the Maximizer MailChimp Integration Service.

2 Open the **MailChimpIntegrationService.exe.config** service configuration file in a text editor.

By default this file is located in the following folder: "%PROGRAMFILES%\MailChimp Integration\MailChimp Integration Service"

3 Update the value of the **ExtraSyncBufferTime** setting with the new synchronization buffer time in milliseconds, for example:

<add key="ExtraSyncBufferTime" value="300"/>

4 Save the changes to the configuration file.

5 Restart the Maximizer MailChimp Integration Service.