MailChimp Daylite Plugin Manual

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1	Gene	ral Information	
	1.1	The MailChimp Plugin for Daylite	4
	1.2	Features	5
	1.3	System Requirements	6
	1.4	Installation	7
	1.5	Purchasing and Adding Licenses	9
2	User	Information	
	2.1	Adding the necessary API Key	12
	2.2	Adding the necessary MailChimp List-ID	14
	2.3	Sending contacts to a MailChimp list	16
	2.4	Getting an update of your subscribers-list from the server	17
	2.5	Merge Key Usage	18
	2.6	Sidenote	21
3	Misc	ellaneous	
	3.1	Questions and Information about MailChimp	23
	3.2	Questions and Information about the MailChimp Daylite Plugin	24
4	Discl	aimer	

26

General Information

The MailChimp Plugin for Daylite

The MailChimp Daylite Plugin is a software-addon for the business-solution Daylite. With this plugin the user can send Daylite-contacts to MailChimp or rather handle them on www.mailchimp.com. The plugin creates a new Dalite-group named [MailChimp Subscriber]. Daylite-contacts can then be moved to this group per drag&drop and be sent to the target MailChimp-list. This mechanism allows the user to comfortably monitor and edit the list of his subscribers from within the Daylite-application. Unsubscribed contacts are automatically deleted from the [MailChimp Subscriber]-group.

Features

The MailChimp plugin for Daylite contains the following features:

- Send Daylite-contacts to MailChimp-Lists
- Unsubscribed contacts are automatically deleted from the Daylite-group [MailChimp Subscriber]

- New Subscribers are automatically sent from the MailChimp-server to the Daylite-group [MailChimp Subscriber]

- MailChimp Merge Key Management is provided from within the Daylite application

Operating System: Mac OSX 10.6 or higher Daylite Version: 3.14 or higher

Installation

1. Make sure that you are running Daylite in version 3.14 or higher. To check your version of Daylite you need to start your Daylite-application and then choose 'Daylite --> 'About Daylite' from the upper context menu.



3. Make sure that you are running MacOSX version 10.6 or higher. To check your version of MacOSX you need to choose <Apple> --> 'About This Mac' from the upper context menu.

Ú.	Finder	File	Edit	View	Go			
A	About This Mac							
50	oftware Up	odate						
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Sy	stem Pref	erence	es					
D	ock				►			
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3. Navigate to where you saved the MailChimp plugin.

4. Perform a double-click on 'mailchimpplugin.daylite-connector'.



5. The plugin is now successfully installed. There are still a few things left to set up. The next chapter 'Purchasing and Adding Licenses' will show you the next steps of the setup-process.

In order to use the MailChimp plugin you need to have successfully purchased and added a valid license. If you have not yet aquired a license for this plugin you can do the following:

- 1. Open your Dayilte application.
- 2. Choose 'Connectors' --> 'MailChimp' --> 'Settings...' from the upper context-menu.

Connectors	Window	v Help	
Licenses	No. INC.	eneral (Sample) – Ca	lendars
MailChimp		Undate with Ma	ilChimp
TOPIX	•	Settings	1 mar 1 m

3. Click on 'Purchase MailChimp Plugin' in the following pop-up window.

MailChimp Plugin for Daylite			
Version 0.1 (2)			
Exchange data between Daylite and MailChimp.			
Copyright 2011, iOSXpert Limited. All rights reserved	l. Internet internet		
License Information		 	
License: DLMC-NY23-(
Name: Philipp			Carter
E-Mail: philipp.kroeber@iosxpert.biz			Base's Res
		Delete license	
Purchase MailChimp Plugi		Send feedback	

- 4. A new email will pop up in which you can state your purchase intentions.
- 5. As soon as you have aquired a license you can enter the data into the corresponding textfields

accordingly. After entering your licence and contact data you can push the 'Add'-button to conclude the procedure.

Connection	Merge Keys	License		
MailChimp Plugin for Daylite				
Version 0.1 (2)				
Exchange data between Daylite and MailChimp.				
Copyright 2011, iOSXpert Limited. All rights reserve	d.			
Add license				
License:				
Name:	ing to Day Arts	owite Editory		
E-Mail:		_		
			Add	
Purchase MailChimp Plugi		Send	feedback	
		IN PROVIDE DVD I	alease ex	

User Information

In order for your MailChimp plugin to work with the MailChimp service you need to aquire a specific API Key and enter it in the plugin settings. To get this key you can follow these steps:

- 1. Open up a browser of your choice and go to 'www.mailchimp.com'.
- 2. In case that you do not already have an account on www.mailchimp.com you can register now.
- 3. Log into your account on the MailChimp-Website .
- 4. From the upper right menu choose 'Account' --> 'API Keys & Authorized Apps'.



5. Now click on 'Add A Key'.

Account				Ok, Phi l. He
API Keys Registered Apps				
API Keys Your API Keys				
Created	Label	API Key	QR Code	i Status
		You don't have any active API keys.		
Add A Key		API keys provide full access to your MallChimp accoun	t, so keep them private	. <u>tips on keeping API keys safe</u>

6. Copy the generated key by highlighting it with your mouse and then pressing the keyboard shortcut <cmd $\Re > + <$ c>.

Your API Keys

Created	Label	API Key
Feb 29, 2012 09:53 am	🥕 none set	0751fb
Add A Key		API keys provide full access to yc

- 7. Open your Daylite application.
- 8. From the upper context menu choose 'Connectors' --> 'MailChimp' --> 'Settings...'.

Connectors	Windov	v Help	
Licenses	k JDQC	eneral (Sample) – Cal	endars
MailChimp		Update with Mai	Chimp
TOPIX	•	Settings	

3. Now click on 'Connections' at the top of the pop-up window. Here you can enter your API Key into the corresponding textfield by pressing the keyboard shortcut <cmd #> + <v>. 4. Conclude the procedure by pushing the 'Save'-button.

		Co	onnection Me	erge Keys 🕴 Lice	nse	
tan Young oor Kaidan oy Martins n Aenold	API Key:	1237zhr	237zu34b127	889u7sdf897		
y Gregoon e Jobeson e Chambers e Singer e Mendonca e Caham e Cabam k Caba	List ID:					
a Martina Dennerman Branson			Save	Discard		Close

MailChimp works with specific List-IDs which also have to be entered in the plugin settings. To set up your List-ID follow these steps:

- 1. Log into your account on www.mailchimp.com .
- 2. From the upper menubar choose 'Lists'.

Dashboard	Campaigns	Lists	Reports	Autoresponders	Account v	search help	٩
				hic, uh, <u>I can stop -</u>	whenever I want.	12	

3. At the desired list you can then click on 'Settings' --> 'List Settings and Unique ID'.

	drag/drop to reorder lists					
Our statist		Testlist 1 @29/2012				
Greate List	4	▲ Import Add People Remove People Send to List Email Beamer				
Design Signup Forms	View	✓ Settings ▼ Replicate Delete I Forms List Data Groups ▼				
		List Settings and Unique ID				
search list subscribers		Publicity Settings				
		List Name and Defaults				
		Fields and Merge Tags				
		Required Email Footer Content				
Leam	Ge	t Help Activate Social Pro Get Fancy				
Getting Started		In Tot Charge for Subscriptions Integrations				
Guides		e Online manning MailChimp API				

- 4. Unten auf der Folgeseite befindet sich die List-ID. Kopieren oder notieren Sie diese.
- 4. At the bottom of the following site is your List-ID. Copy or write it down.

unique id	for list Te	stlist 1
0533f7		

5. Open your Daylite application.

6. From the upper context menu choose 'Connectors' --> 'MailChimp' --> 'Settings...'.

Connectors V	Vindow	v Help
Licenses eneral (Sample) - Calendars		
MailChimp	•	Update with MailChimp
TOPIX	•	Settings

7. At the top of the pop-up window you can now click on 'Connections'. Here you can enter your List-ID into the corresponding textfield.

8. Conclude this procedure by clicking the 'Save'-button.

og Malwine			
r Chan			
America	API Kev:	1237zhr237zu34b127889u7sdf89	97
	/		
	List ID:	76fd7632h	
			,
Singer			
Graham			
Cash			
y mughes			
		Save Discard	

Remarks:

The MailChimp plug-in supports only one MailChimp list at the moment. I a future version we will add support for multiple lists.

Sending contacts to a MailChimp list

The MailChimp plugin automatically creates a new Daylite-group named [MailChimp Subscriber]. You can drag&drop the contacts that you want to send to the MailChimp list into this group. To do so follow these steps:

1. Open your Daylite application.

2. Highlight the desired contact(s) with your mouse and drag them over the 'Group'-button in Daylite. After hovering over this button for about 2 seconds the view changes and you can drop the contacts onto the [MailChimp Subscriber]-group.



4. Complete the procedure by choosing 'Connectors' --> 'MailChimp' --> 'Update with MailChimp' from the upper context menu.

Getting an update of your subscribers-list from the server

The MailChimp plugin user can request updates about the his current list of subscribers and simultaneously update his Daylite-group [MailChimp Subscriber]. This means that new contacts that have been added online through the MailChimp interface will be added and unsubscribed contacts will be deleted from the group.

To get such an update you need to choose 'Connectors' --> 'MailChimp' --> 'Update with MailChimp' from the upper context menu.

Doing that will reslut in a pop-up window similar to this one:



Merge Key Usage

The MailChimp plugin offers the option of managing your MailChimp Merge Keys. Should the term 'Merge Key' be new to you please visit www.mailchimp.com for more information.

To manage your Merge Keys follow these steps:

- 1. Open your Daylite application.
- 2. From the uppper context menu choose 'Connectors' --> 'MailChimp' --> 'Settings...'.

Connectors W	/indow	Help
Licenses eneral (Sample) - Calendars		
MailChimp 🕨		Undate with MailChimp
TOPIX	•	Settings

3. Now click on 'Merge Keys' in the pop-up window.

Crippensistered Wit	Connection Merge Keys	License	
Merge Tag	Description	Field in Daylite	
Reload list			Save
			Close

4. A click on the button 'Reload list' updates the list with your personal Merge Keys from www.mailchimp.com.

		Connection Merge Keys	License	1
	Merge Tag	Description	Field in Daylite	
	SALUTATION	Salutation	\$	
100				
L	Reload list		Save	
			Close)

5. You can now check the Merge Keys that you want to use and choose a corresponding 'Field in Daylite' in which this Merge Key will be entered.

Neues P	Sample_[DE]Standard(Beispiel) -	Extra 1 Extra 2 Extra 2 Extra 3 Extra 4 Extra 5 Extra 6 Extra 7 Extra 8 Extra 9 Extra 10 Extra 10 Extra 11 Extra 12 Salutation Individual Salutation	
Merge Tag	Description	Julia	
SALUTATION	Salutation	\checkmark	+
Reload list		Sav	e
			Close

6. Complete the procedure by pressing the 'Save'-button.

Sidenote

To change the email address of a contact in the Daylite-group [MailChimp Subscriber] you need to first manually delete this contact from the MailChimp-list. The next 'Update with MailChimp' will then automatically add this contact again with the updated emailaddress. Not paying attention to this can result in duplicating the contact in Daylite and MailChimp.

A future version of this plugin should solve this behaviour.

Miscellaneous

If you have problems, questions or general information requests regarding the MailChimp online service please visit the MailChimp Support Website.

Questions and Information about the MailChimp Daylite Plugin

If you have problems, questions or general information requests regarding the MailChimp Daylite plugin please visit www.iosxpert.biz.

Disclaimer

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