

MailChimp Daylite Plugin Manual

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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

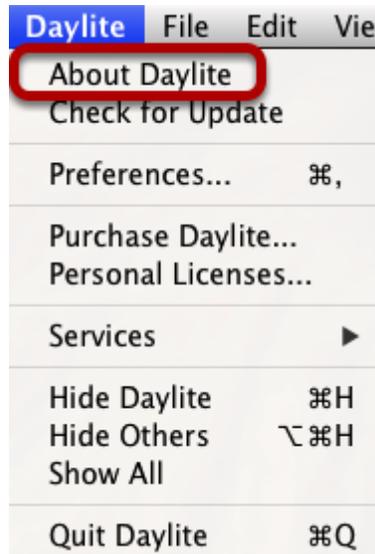
System Requirements

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.



3. Navigate to where you saved the MailChimp plugin.

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

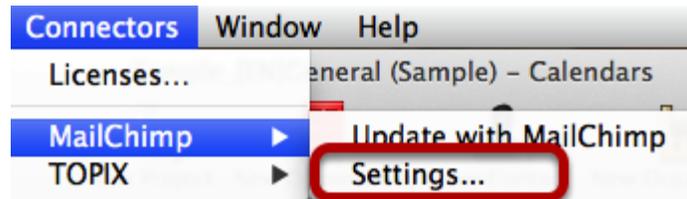


5. The plugin is now successfully installed. There are still a few things left to set up. The next chapter 'Purchasing and Adding Licenses' will show you the next steps of the setup-process.

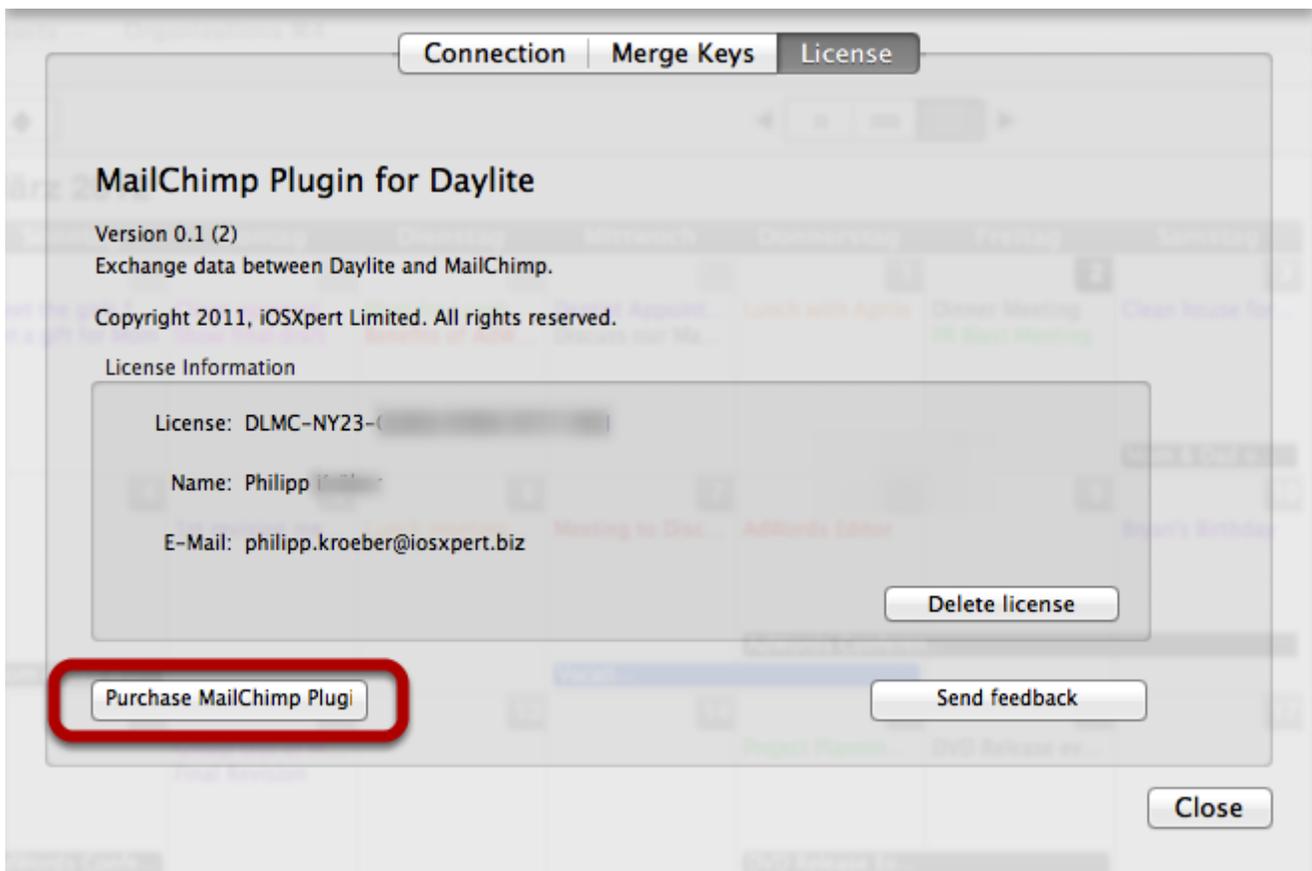
Purchasing and Adding Licenses

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

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

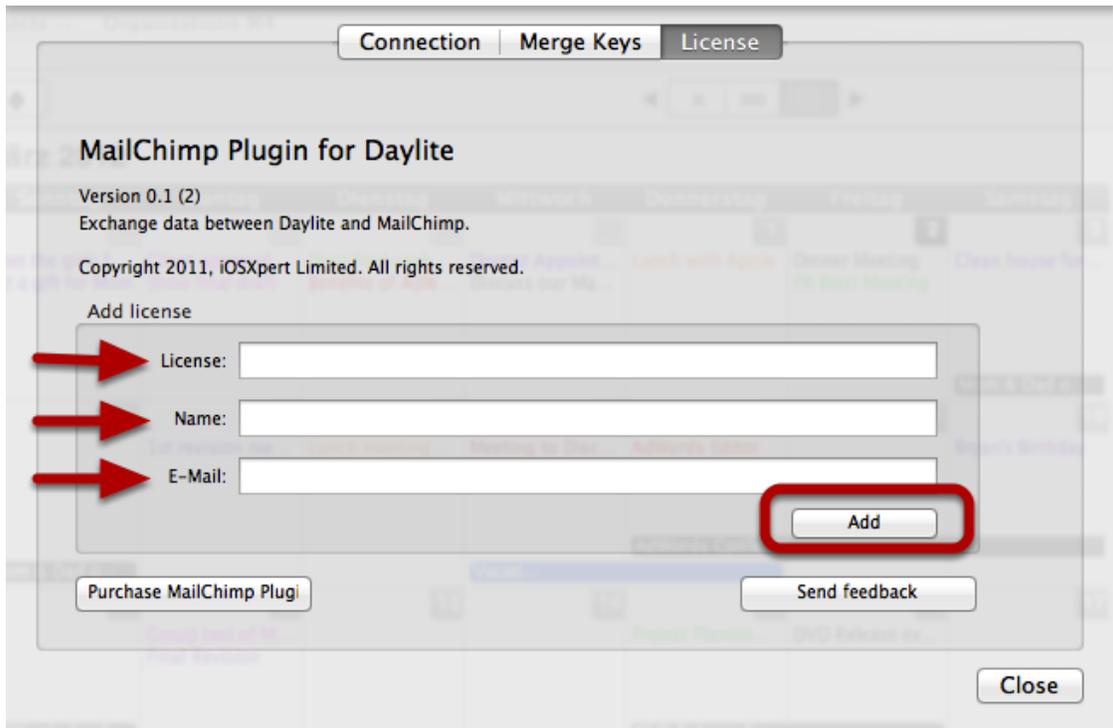


3. Click on 'Purchase MailChimp Plugin' in the following pop-up window.



4. A new email will pop up in which you can state your purchase intentions.
5. As soon as you have acquired 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.

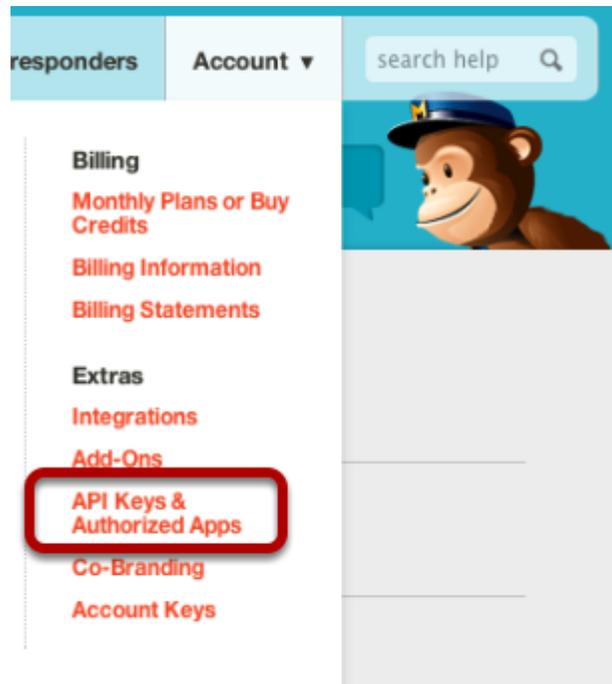


User Information

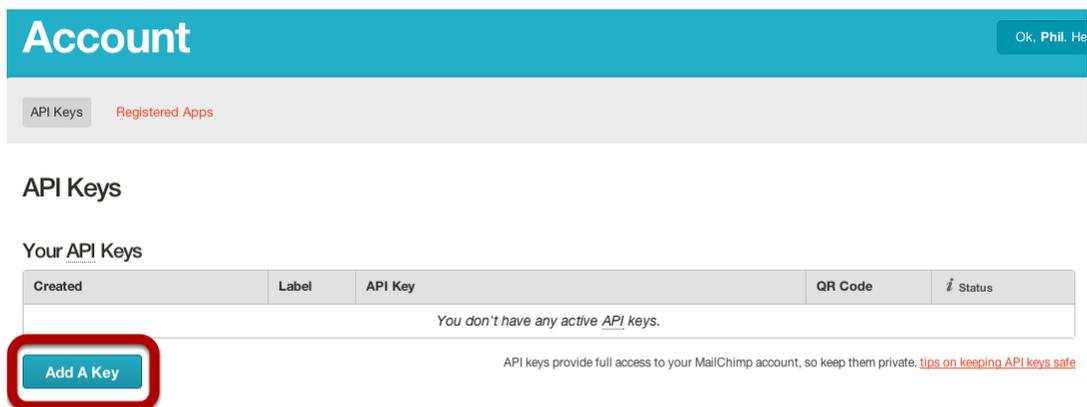
Adding the necessary API Key

In order for your MailChimp plugin to work with the MailChimp service you need to acquire 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'.



6. Copy the generated key by highlighting it with your mouse and then pressing the keyboard shortcut <code><cmd ⌘> + <c></code>.

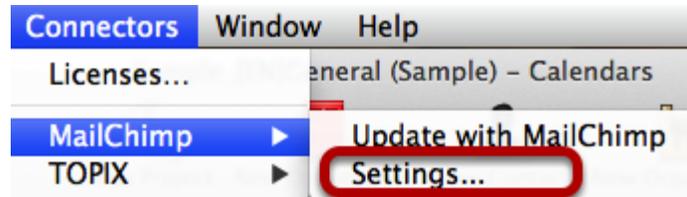
Your API Keys

Created	Label	API Key
Feb 29, 2012 09:53 am	 none set	0751fb

[Add A Key](#) API keys provide full access to yc

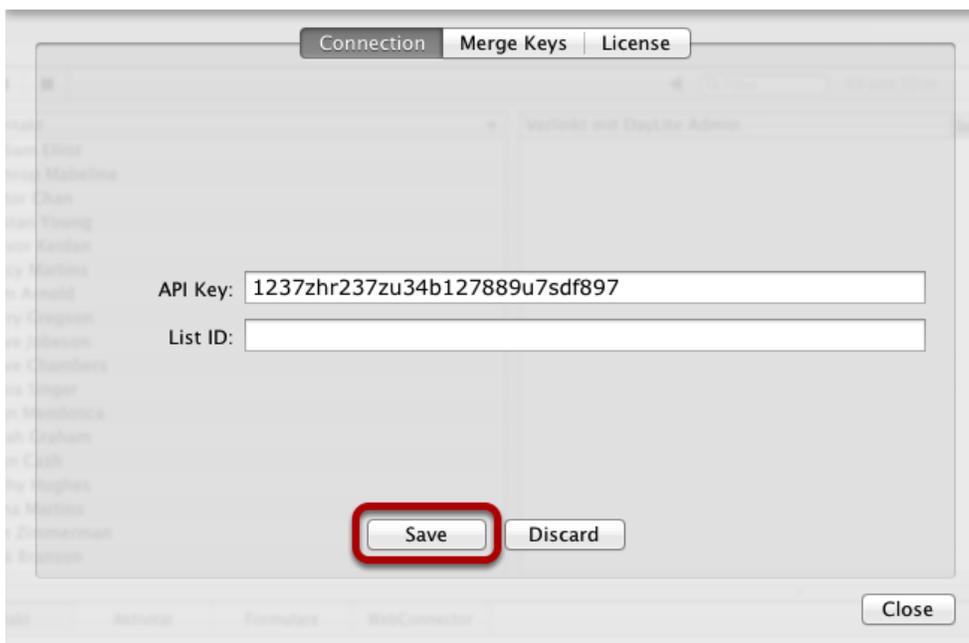
7. Open your Daylite application.

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



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.



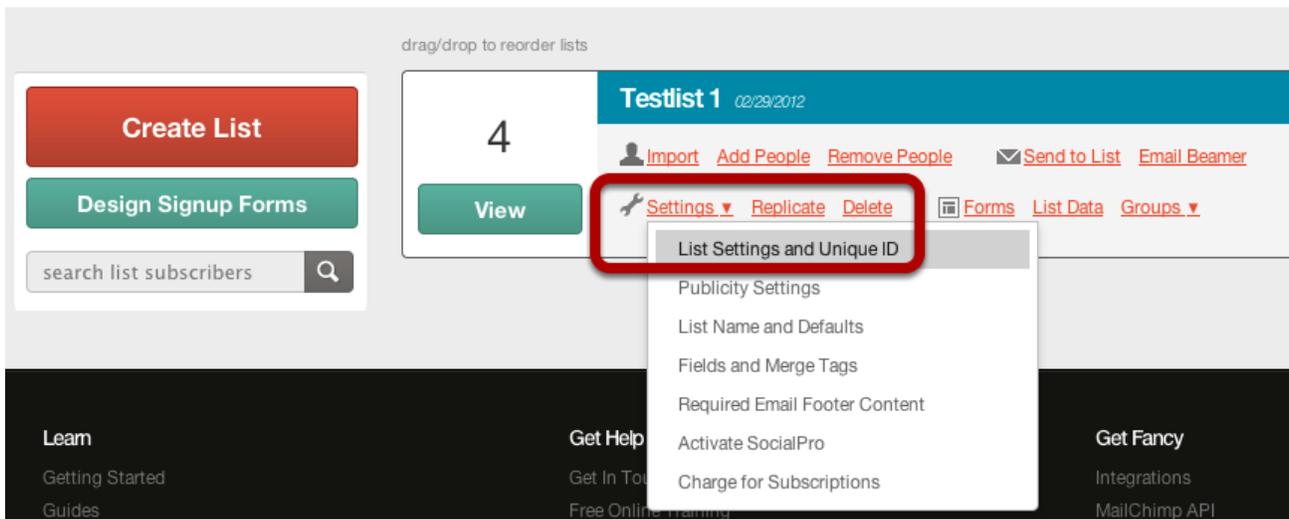
Adding the necessary MailChimp List-ID

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'.



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



4. Unten auf der Folgeseite befindet sich die List-ID. Kopieren oder notieren Sie diese.

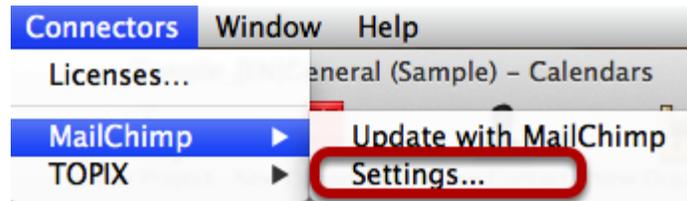
4. At the bottom of the following site is your List-ID. Copy or write it down.

unique id for list Testlist 1

0533f7

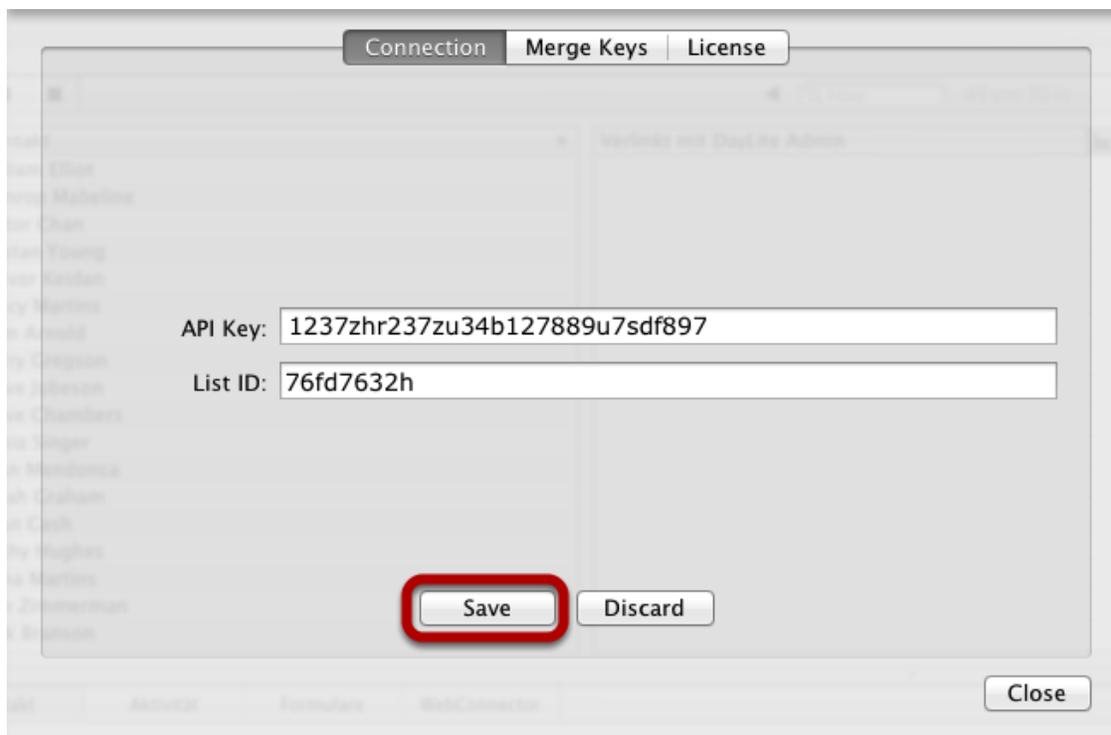
5. Open your Daylite application.

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



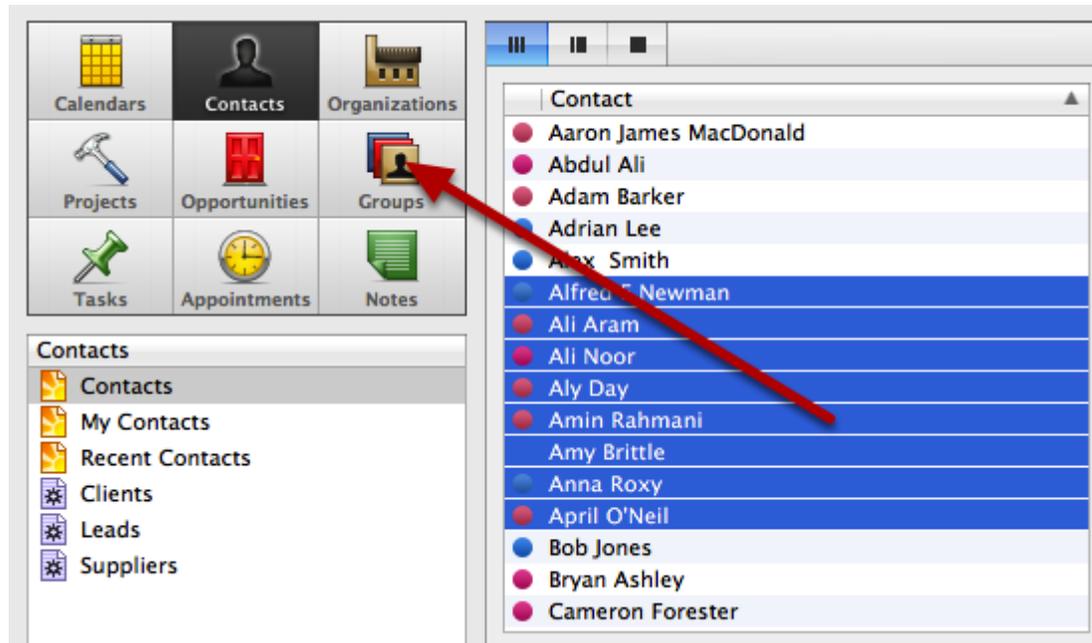
Remarks:

The MailChimp plug-in supports only one MailChimp list at the moment. In 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 result in a pop-up window similar to this one:

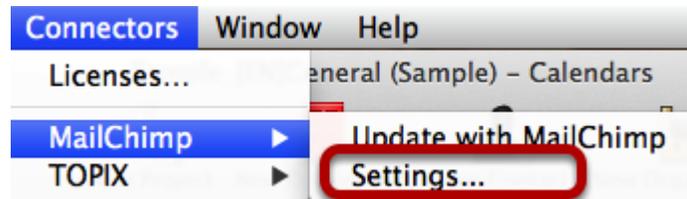


Merge Key Usage

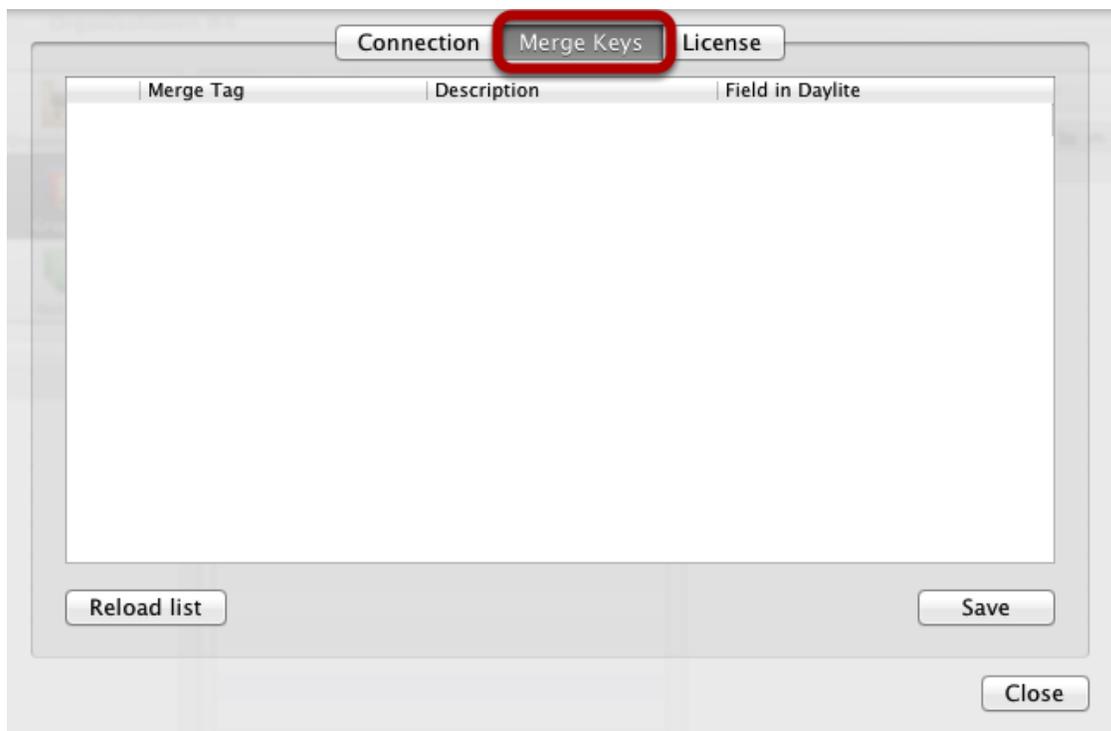
The MailChimp plugin offers the option of managing your MailChimp Merge Keys. Should the term 'Merge Key' be new to you please visit www.mailchimp.com for more information.

To manage your Merge Keys follow these steps:

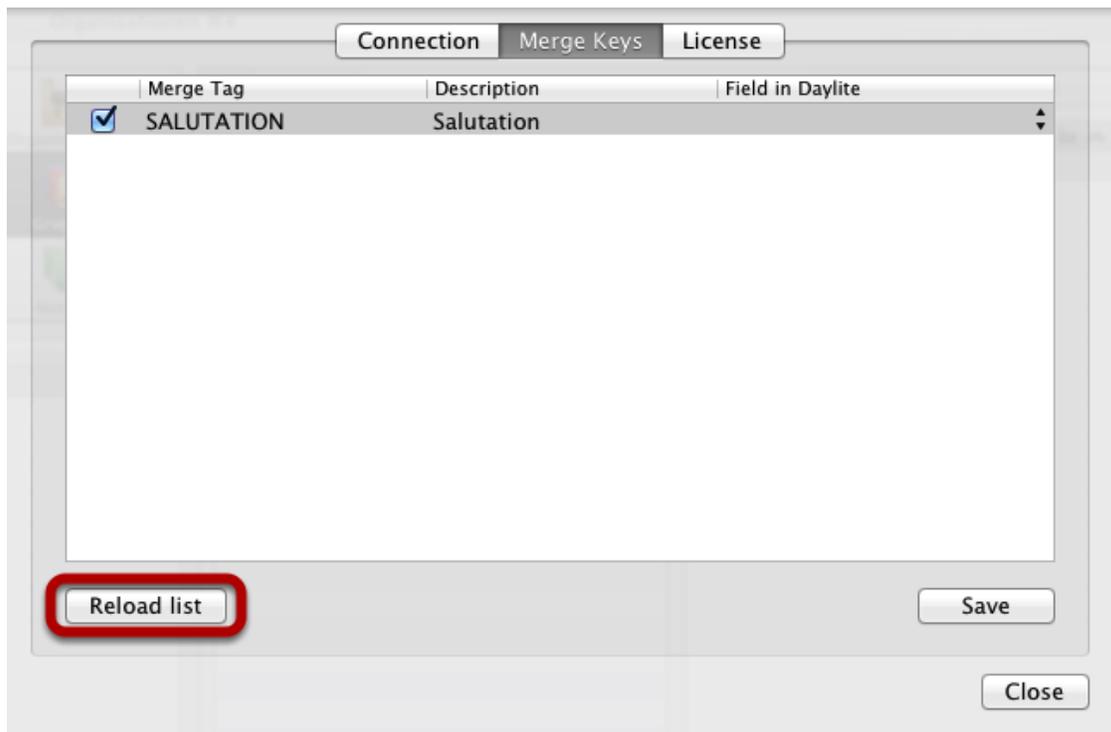
1. Open your Daylite application.
2. From the upper context menu choose 'Connectors' --> 'MailChimp' --> 'Settings...'



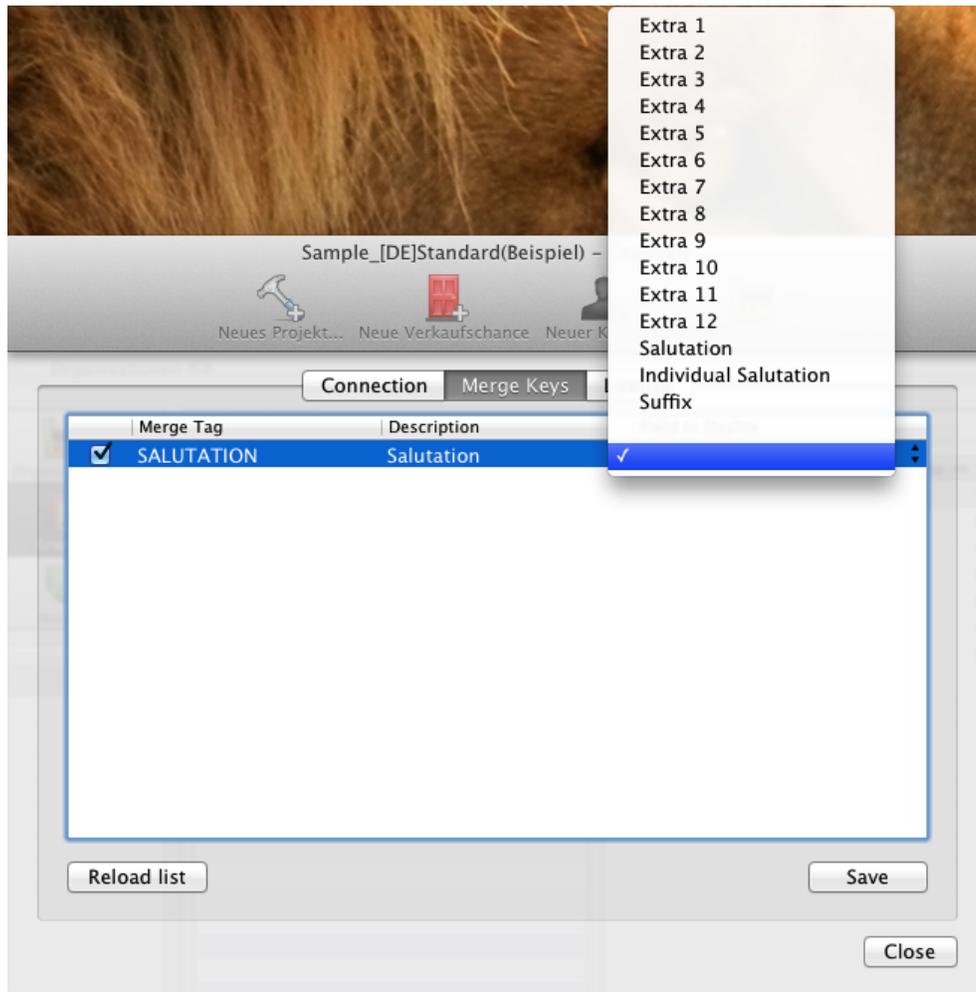
3. Now click on 'Merge Keys' in the pop-up window.



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



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.



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

Questions and Information about MailChimp

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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