MailChimpConnector for Daylite

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General

MailChimpConnector for Daylite

About

MailChimpConnector integrates the newsletter service MailChimp in Daylite.

MailChimpConnector enables you to sync your Daylite contacts with MailChimp. MailChimpConnector creates groups in Daylite according to your Lists on mailchimp.com. All contacts linked to that group(s) are being synced with the appropriate MailChimp list and provide a convenient way to manage your newsletter recipients. In addition MailChimpConnector supports segmented lists and merge tags. MailChimpConnector also provides the option to view detailed MailChimp reports as well as to view and edit MailChimp lists from within Daylite.

Features

MailChimpConnector provides the following features:

- Manage multiple MailChimp lists
- Sync between Daylite groups and MailChimp lists
- Detailled sync log
- Assign Daylite fields to MailChimp merge tags
- Create segments to target specific subscribers
- View MailChimp reports or view and edit lists from within Daylite

System Requirements

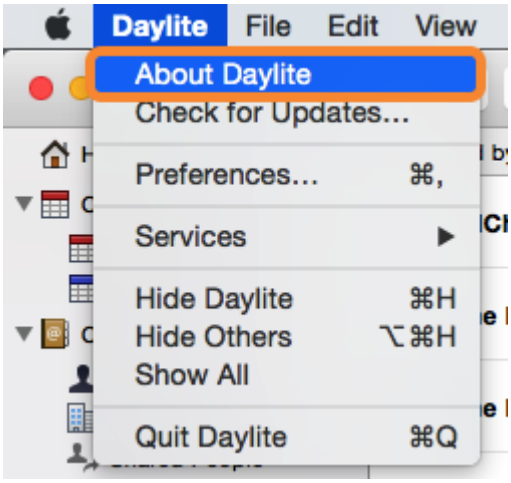
Operating System: OS X 10.8 or newer

Daylite Version: 4.3 or newer

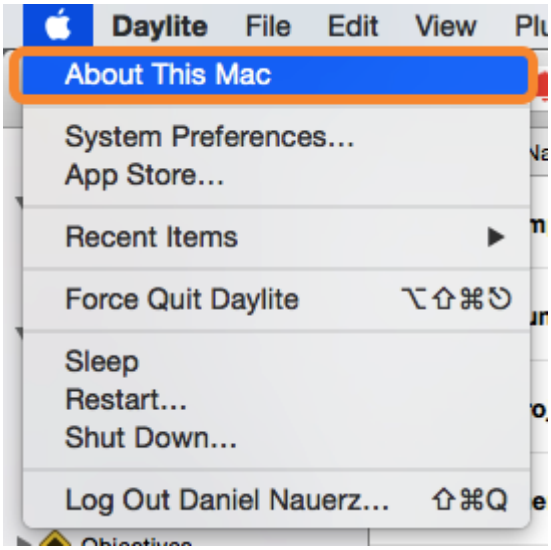
Setup

Installation

1. MailChimpConnector requires Daylite 4.3 or newer. To check your Daylite version, go to the Daylite menu and select 'About Daylite'.

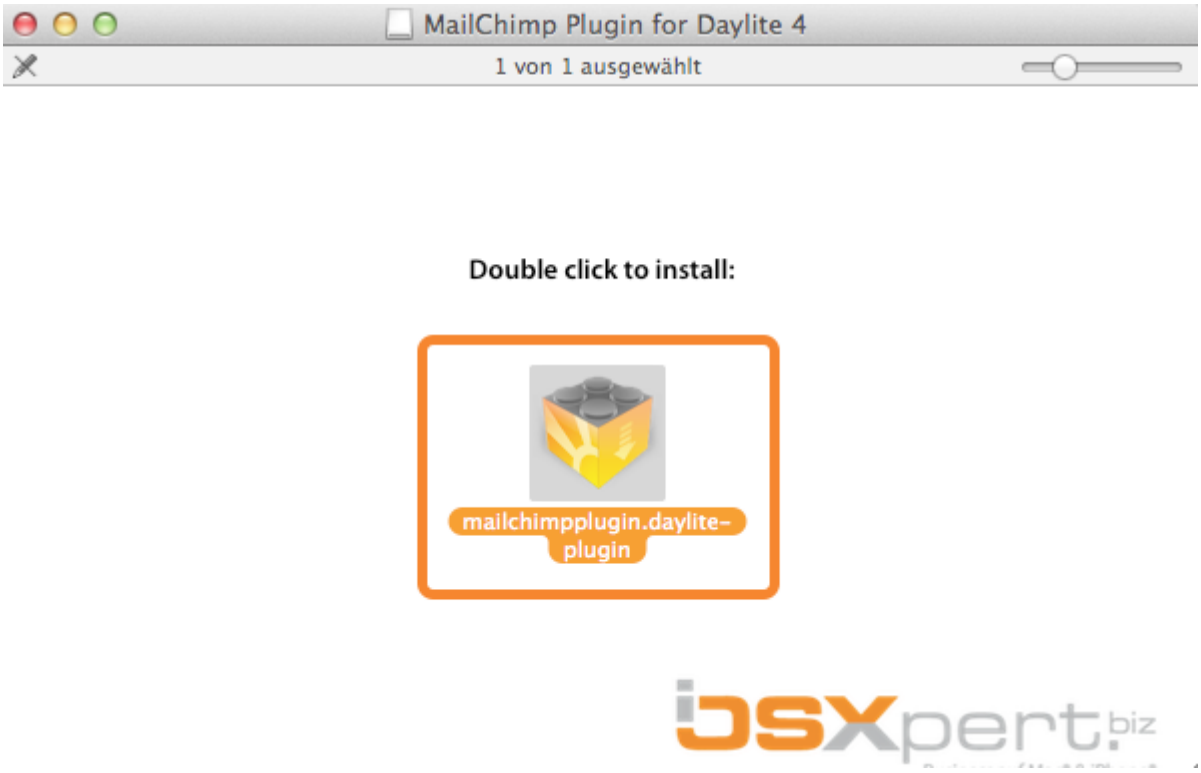


2. MailChimpConnector requires OS X 10.8 or newer. To check your OS X version, go to the Apple menu and select 'About this Mac'.

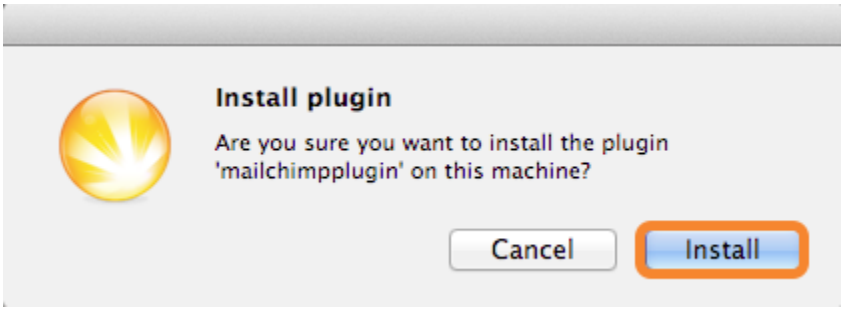


3. Double click 'MailChimpConnector_for_Daylite.dmg'.

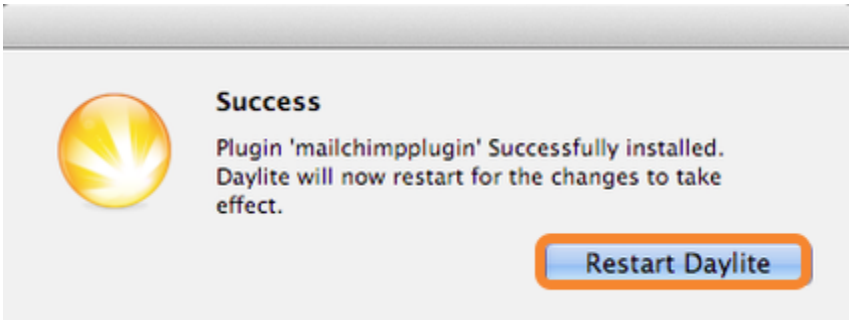
4. Double click 'mailchimpplugin.daylite-plugin'



5. Click 'Install' to confirm installation



6. Click 'Restart Daylite' to finalize the install



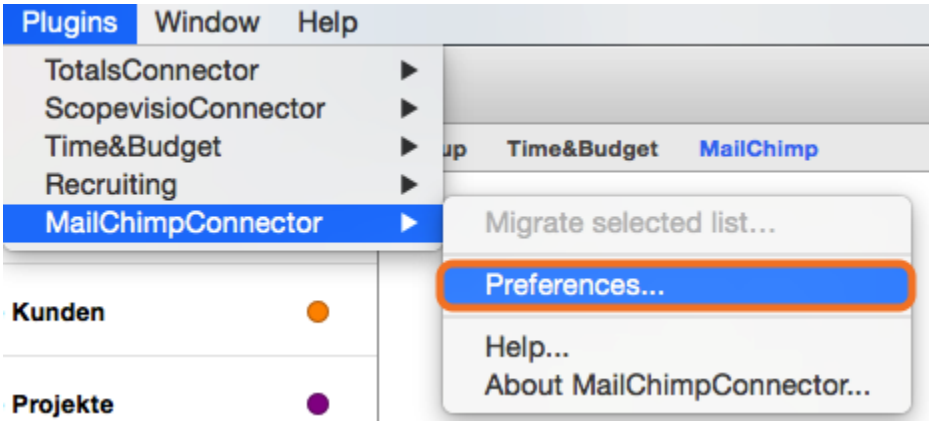
7. After the installation MailChimpConnector can be used free of charge for 14 days. If you would like to use it after these 14 days, please proceed to chapter 'Licensing'.

Licensing

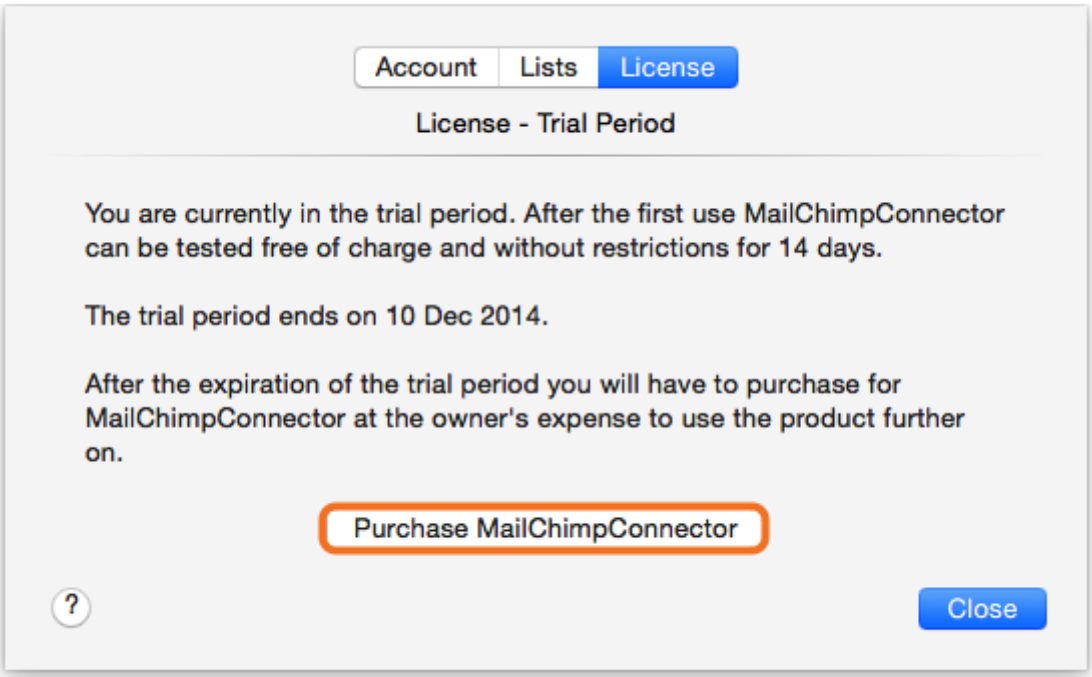
After the installation you can test MailChimpConnector during a 14 day trial period. If you would like to use the plugin after this period of time, you will need to subscribe to MailChimpConnector on a monthly basis. In order to subscribe, please follow these steps (given the plugin is already installed):

1. Start Daylite

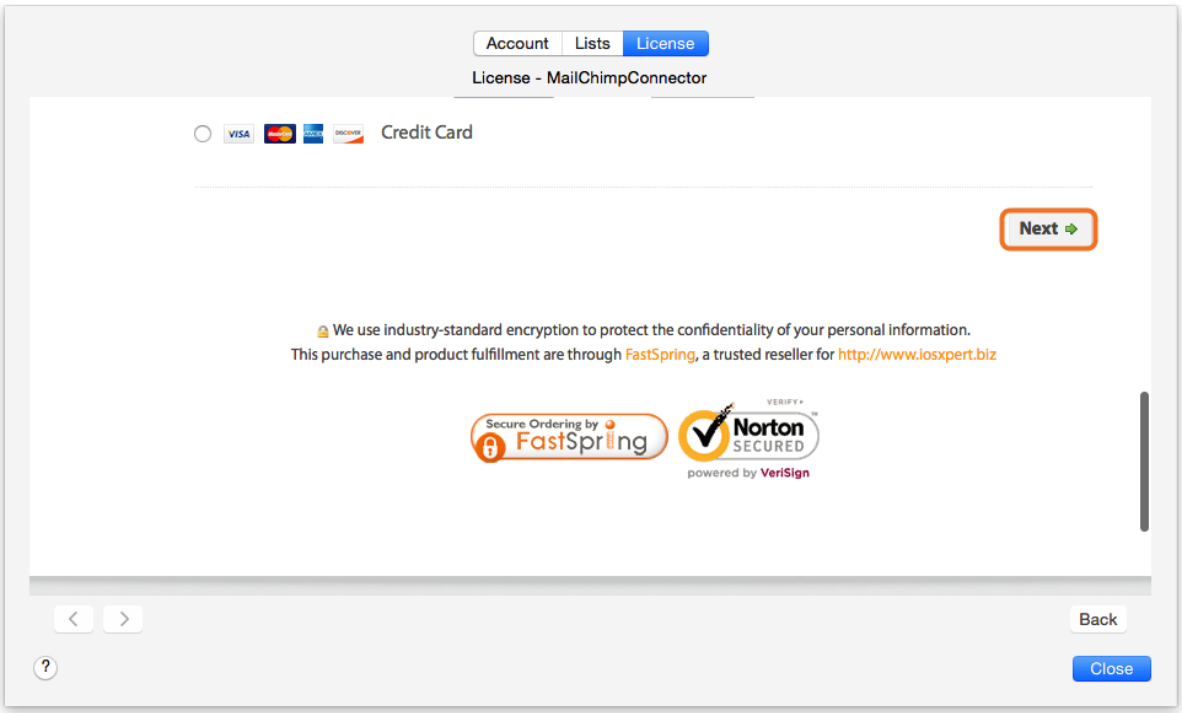
2. In the Daylite menu select Plug-Ins --> MailChimpConnector --> Preferences...



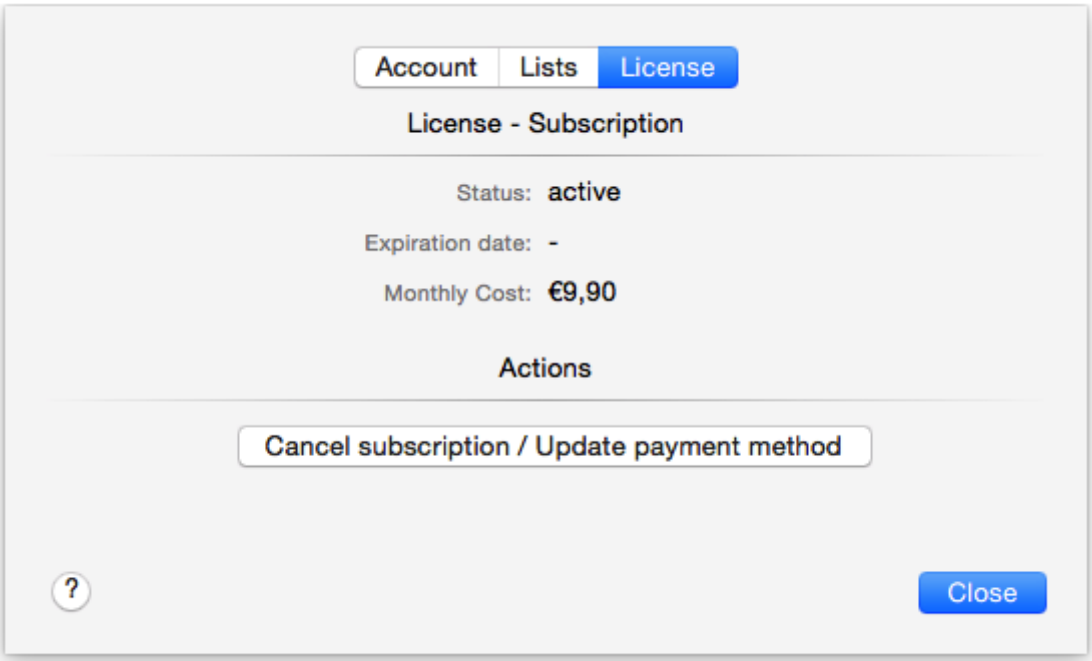
3. Click the License tab and select Purchase MailChimpConnector...



4. After filling in the form click **Next** and confirm the subscription



5. After finishing the subscription process successfully, you are being presented a licensing summary


Account
Lists
License
License - Subscription
Status: active
Expiration date: -
Monthly Cost: €9,90
Actions
Cancel subscription / Update payment method
?
Close

Usage

Entering the required API key

To link your MailChimp account with MailChimpConnector you need to enter your MailChimp API key.

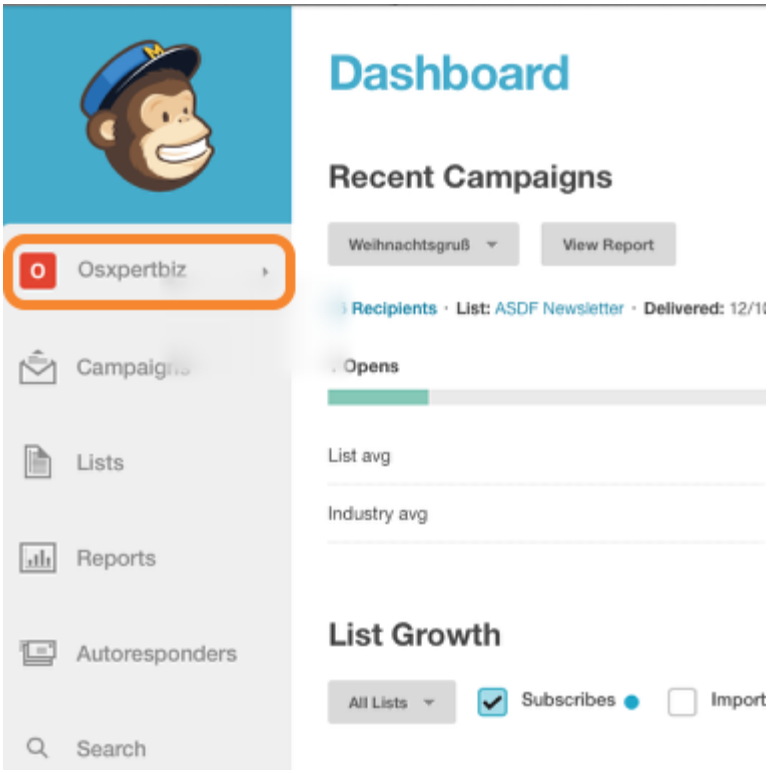
In order to do so, please follow these steps:

1. Visit 'www.mailchimp.com'

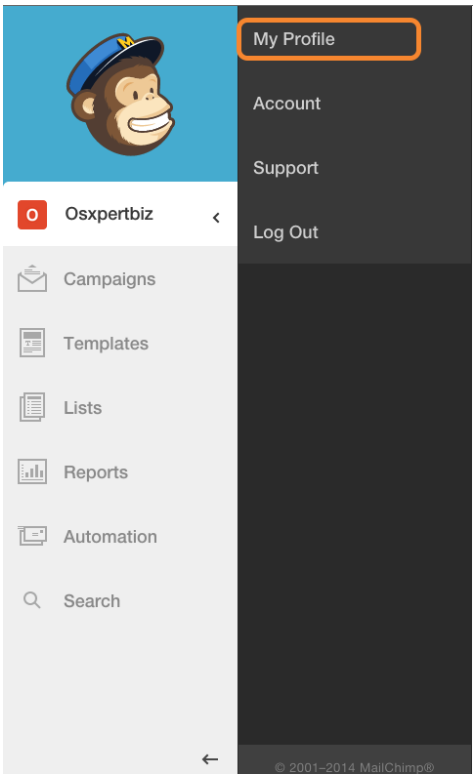
2. If you haven't already done so, create an account with MailChimp

3. Log on to you account

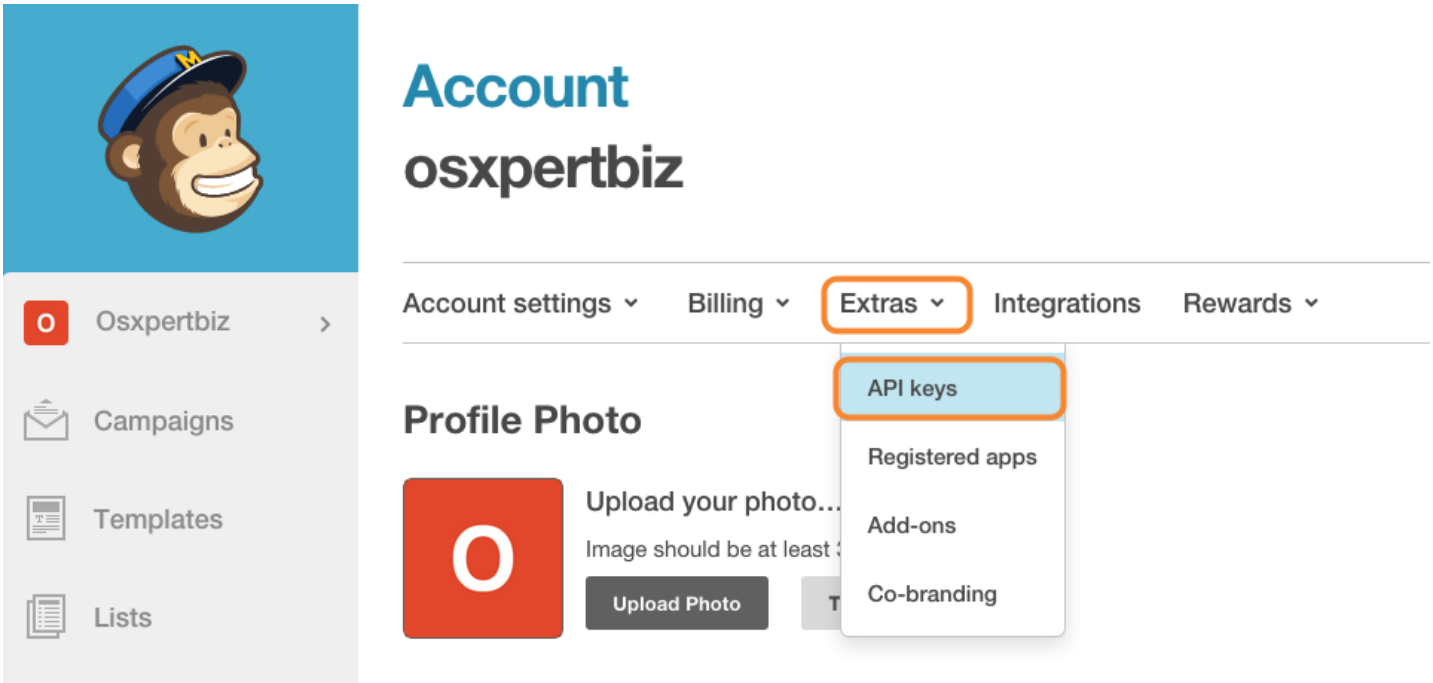
4. Click your account name on the left hand side



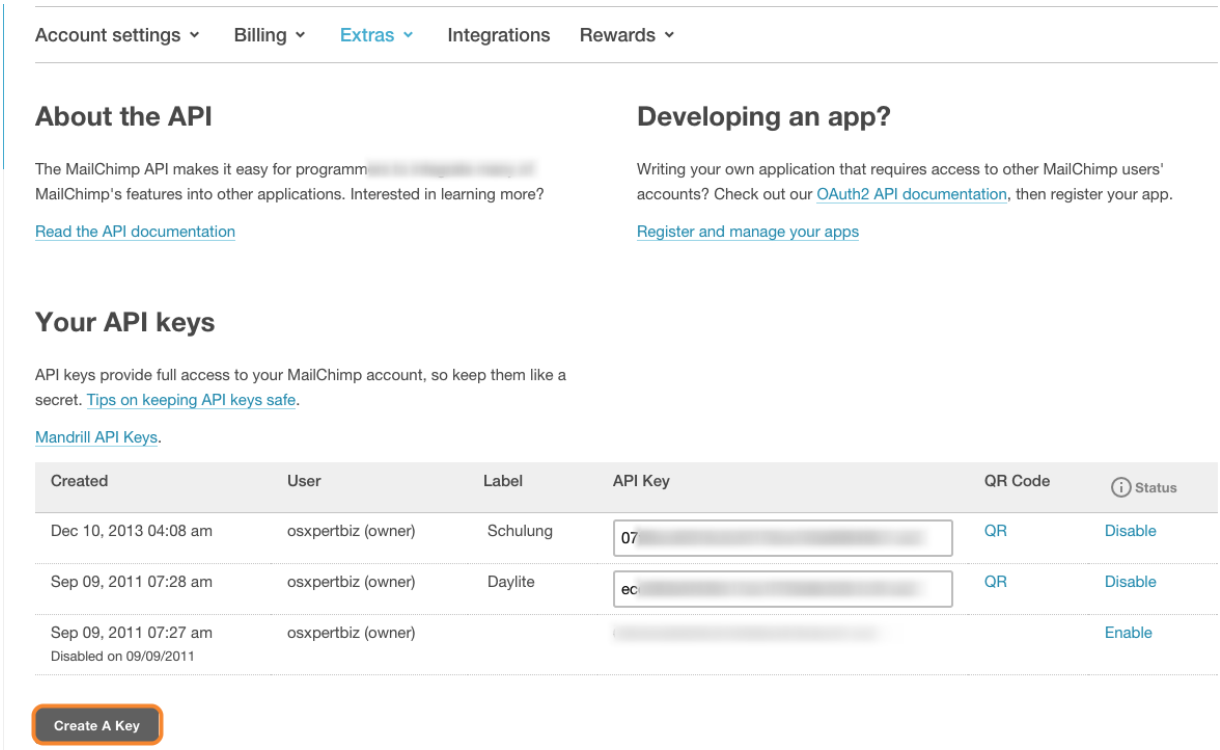
5. Select My Profile



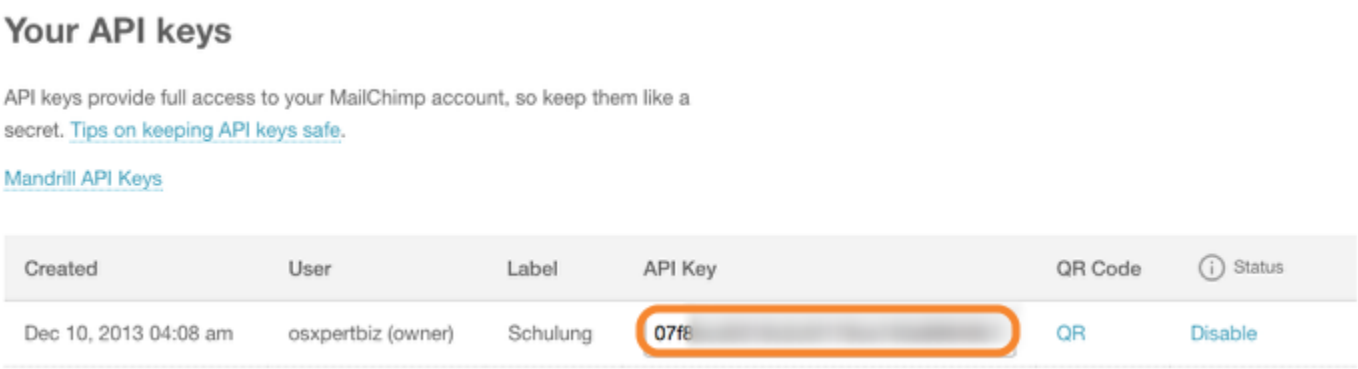
6. Navigate to Extras -> API keys



7. If there is no API key available yet, click Create A Key

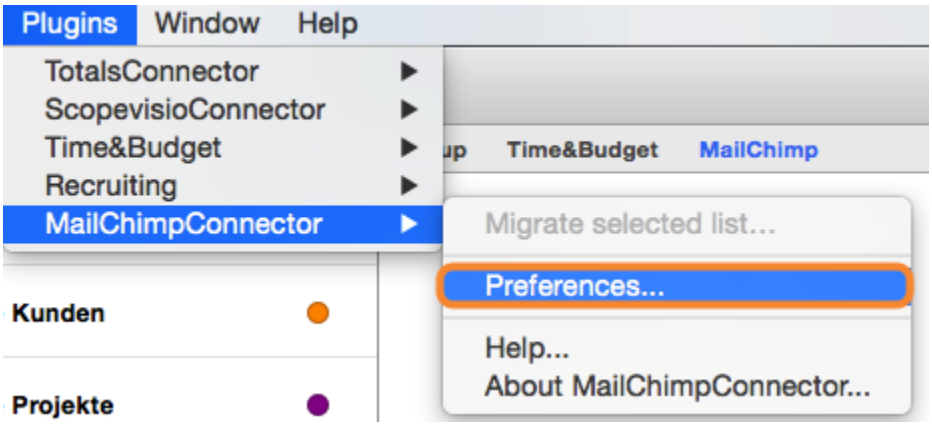


7. Select the key and copy it using the shortcut <cmd ⌘> + <c>

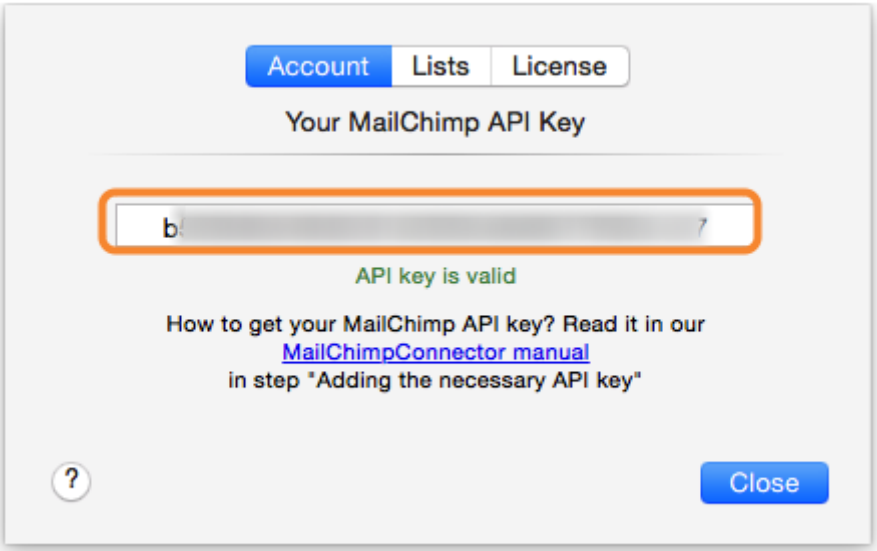


8. Start Daylite

9. In the Daylite menu navigate to Plugins -> MailChimpConnector -> Preferences...



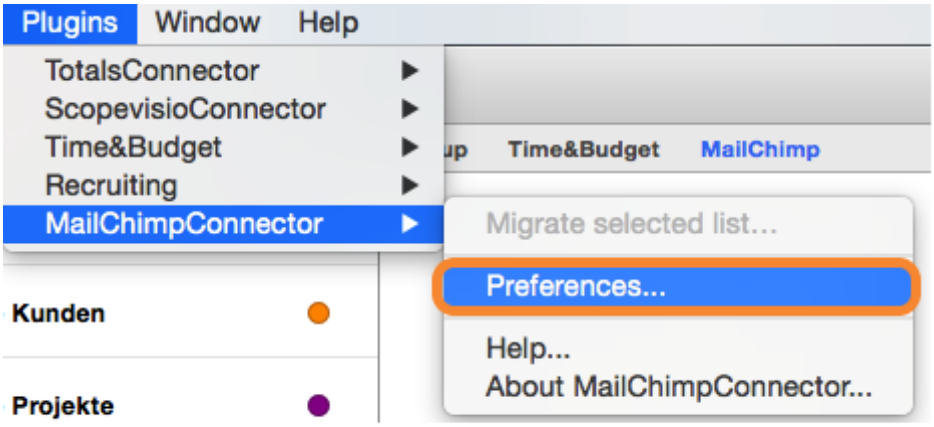
10. Click the **Account** tab and paste the API Key into the appropriate field using the shortcut <cmd ⌘> + <v>



Managing Lists

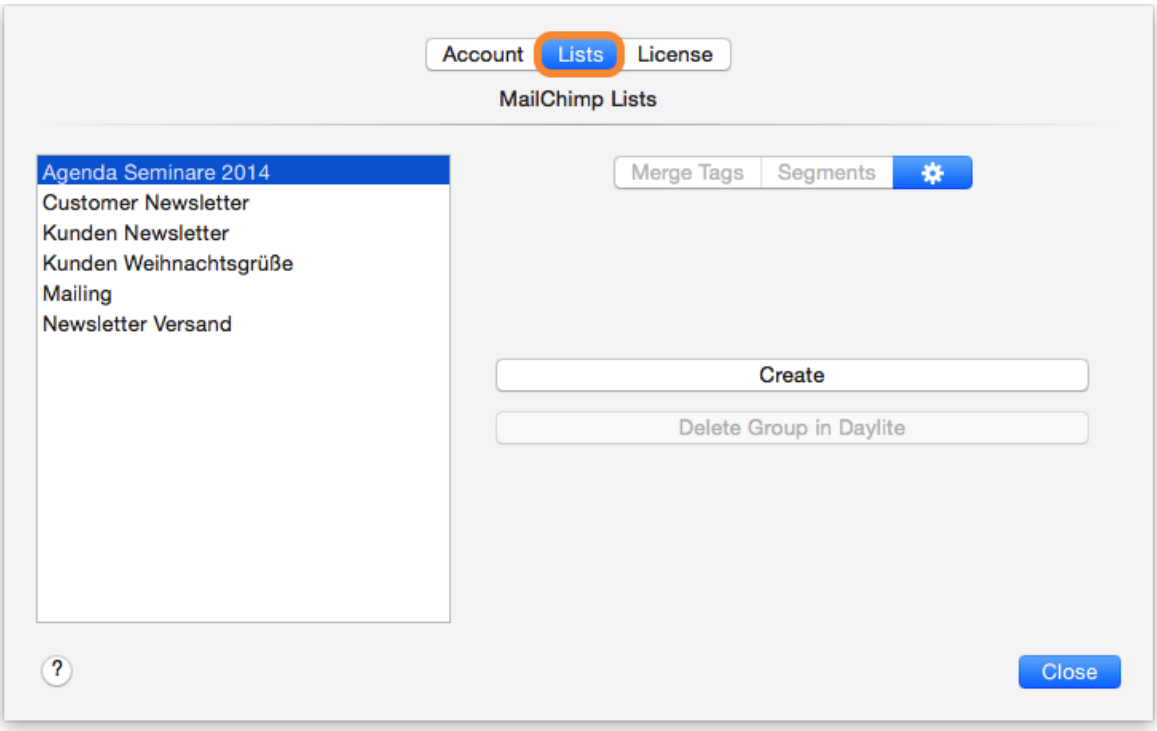
To be able to manage your MailChimp lists in Daylite it is imperative to enter your API key beforehand, as described in the previous chapter.

1. In Daylite navigate to **Plugins** -> **MailChimp** -> **Preferences...**



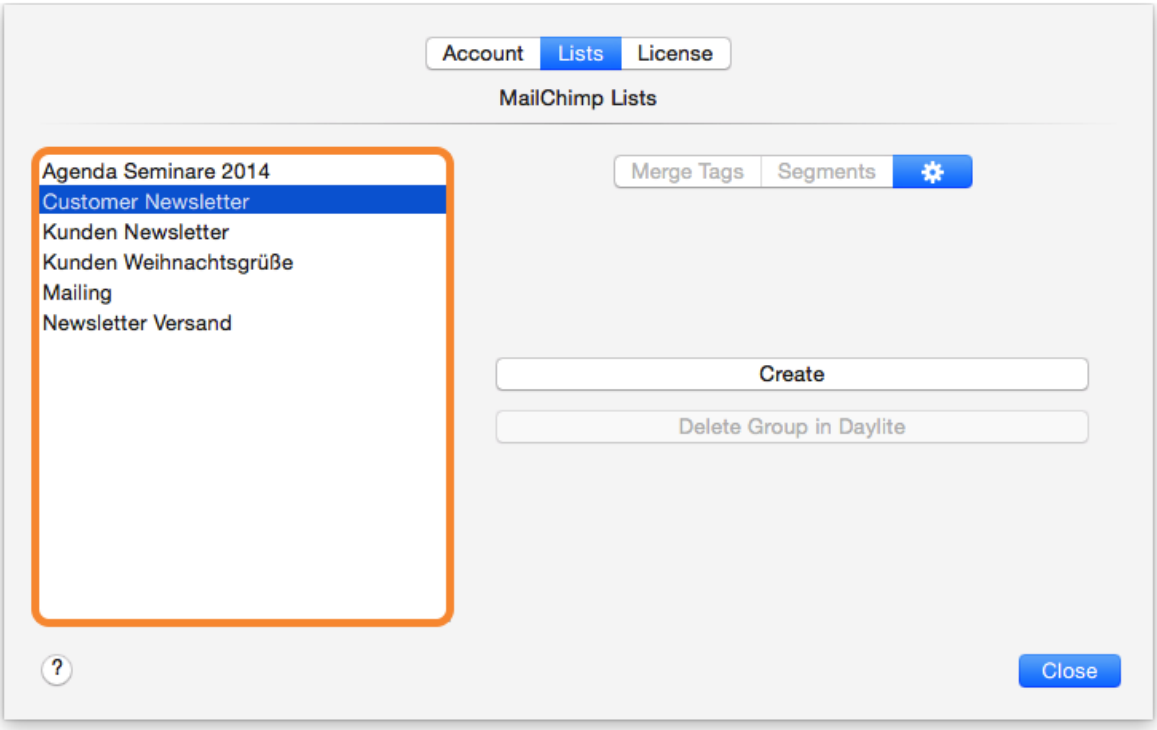
2. Select the **Lists** tab

On the left hand side of the window you'll see all your MailChimp lists. Lists that have been imported to Daylite already are displayed in bold letters and show a green dot at the end of the line. The following steps describe how to manage MailChimp lists in Daylite.

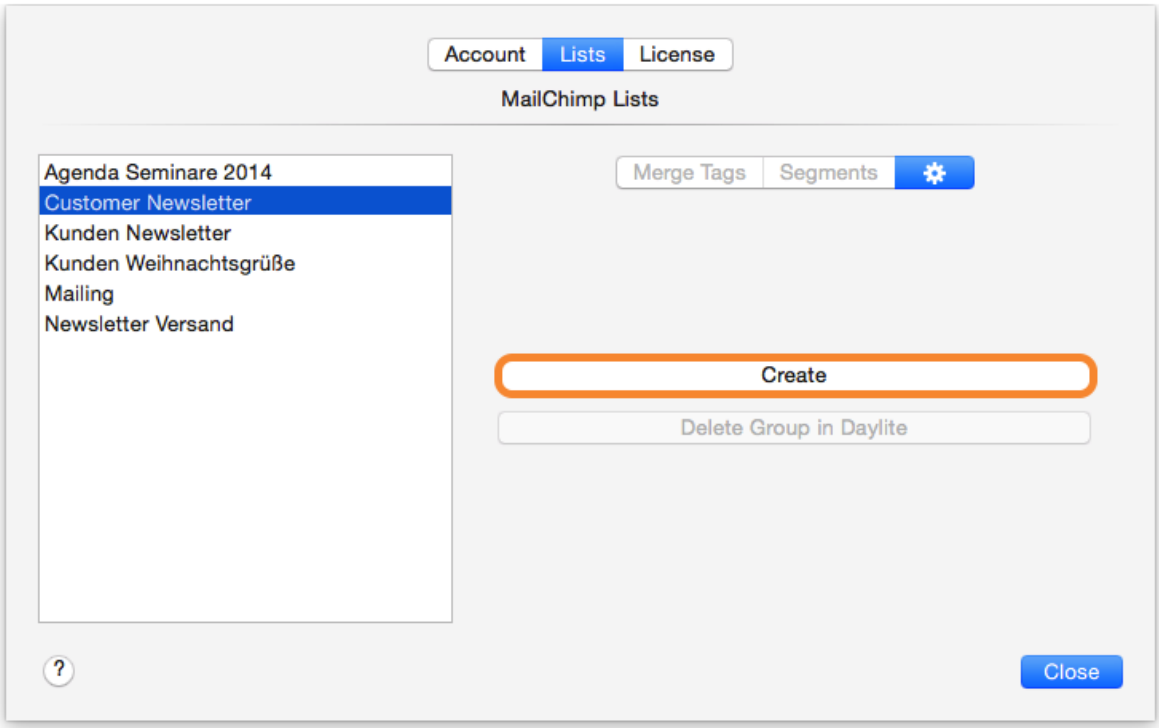


Importing a MailChimp List as a Group in Daylite

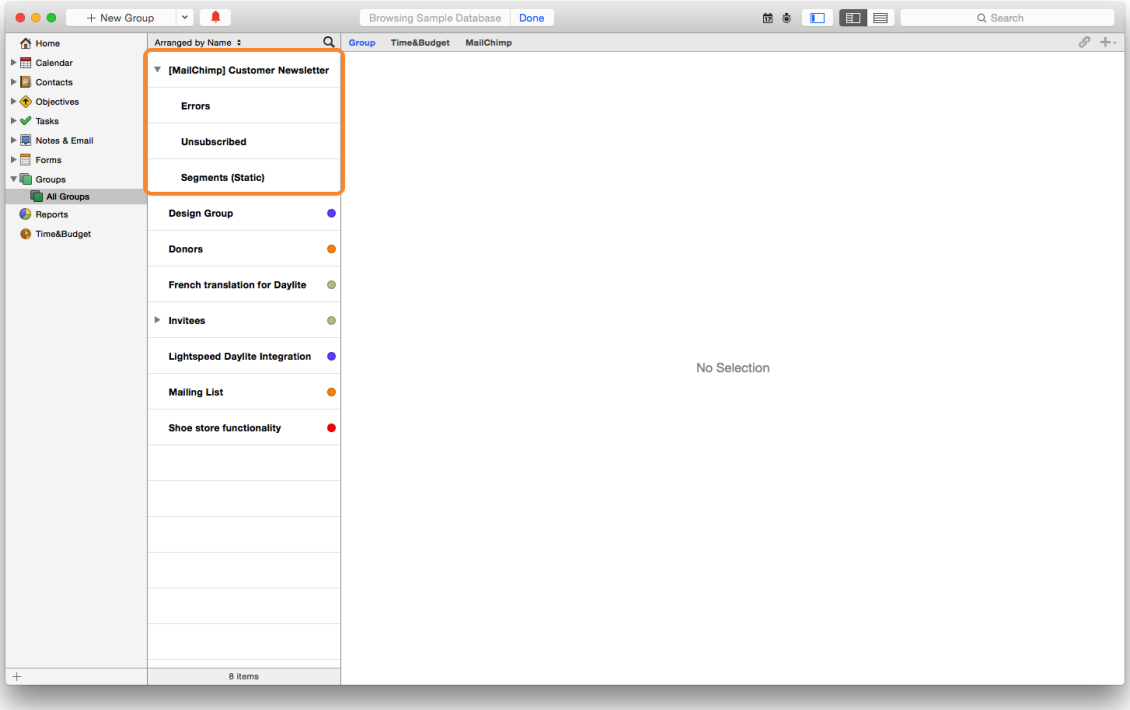
1. Select the desired list on the left hand side of the window



2. Click **Create** to import the list as a group in Daylite

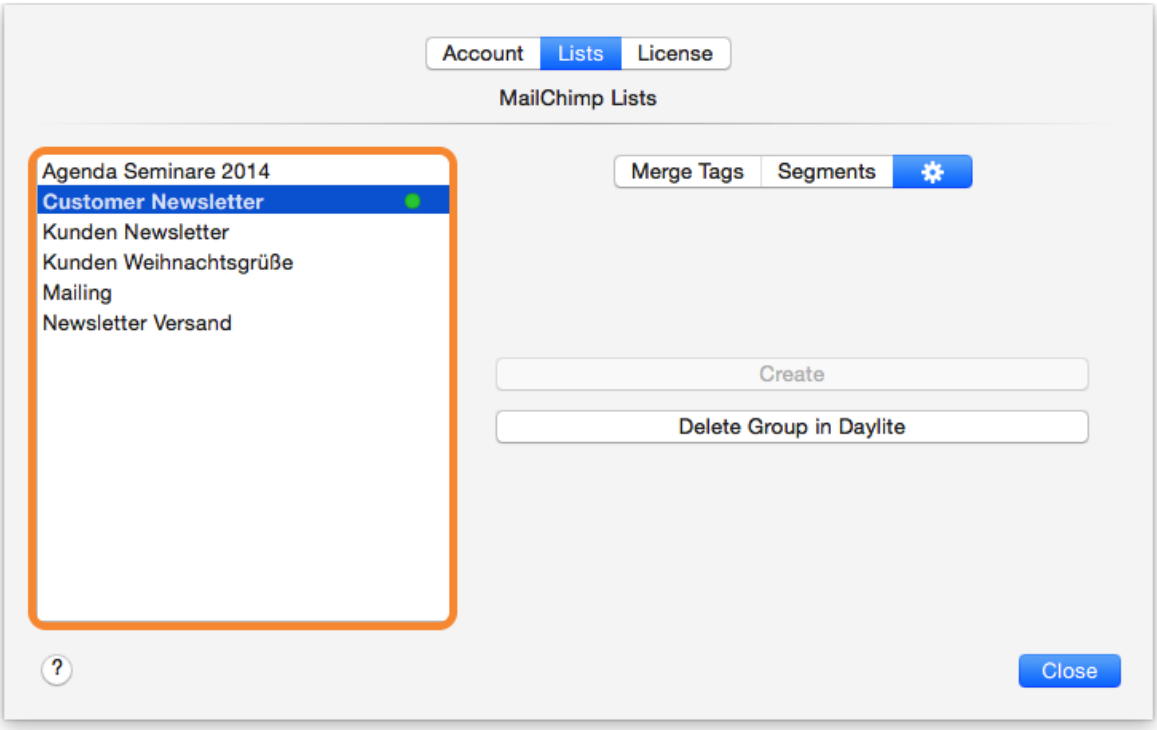


3. An imported MailChimp list shows up in Daylite as a group named '[MailChimp] <your MailChimp list name>'. This group contains the three subgroups 'Errors', 'Unsubscribers' and 'Segments (Static)'. The 'Errors' subgroup contains all recipients that ran into an error during a sync with MailChimp. The 'Unsubscribers' subgroup contains all recipients who unsubscribed from your mailing list. The 'Segments (Static)' subgroup will be explained later on in this chapter.

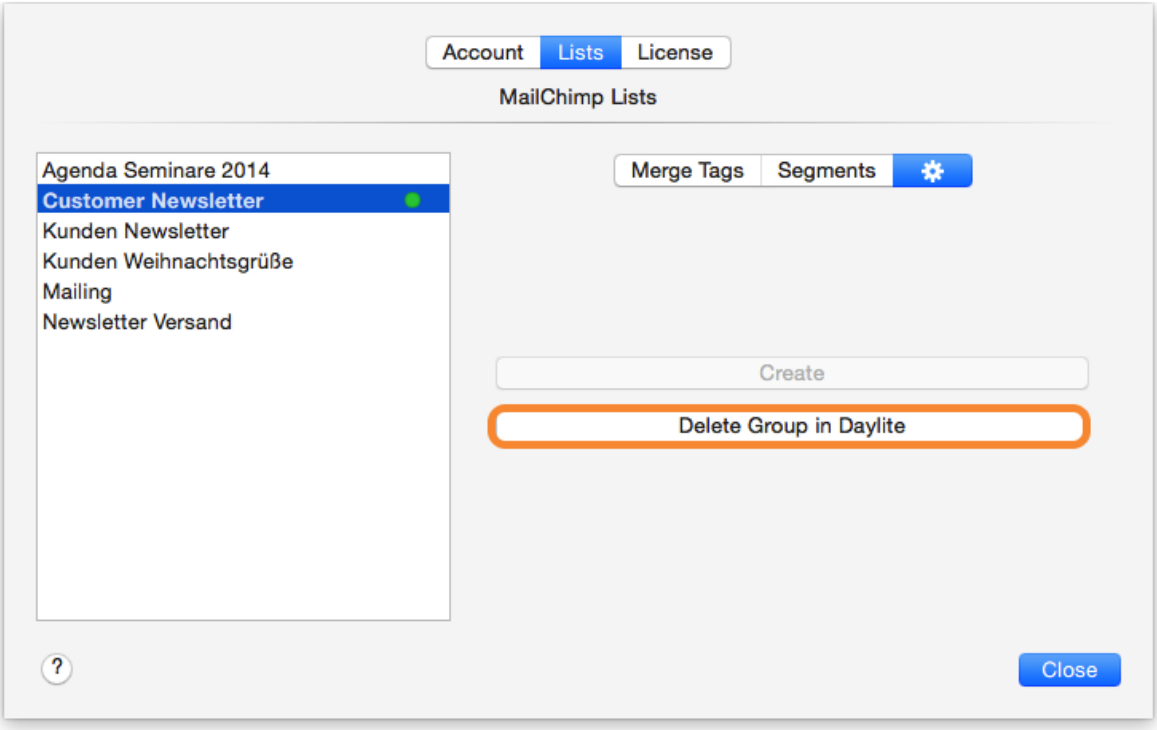


Deleting a MailChimp Group in Daylite

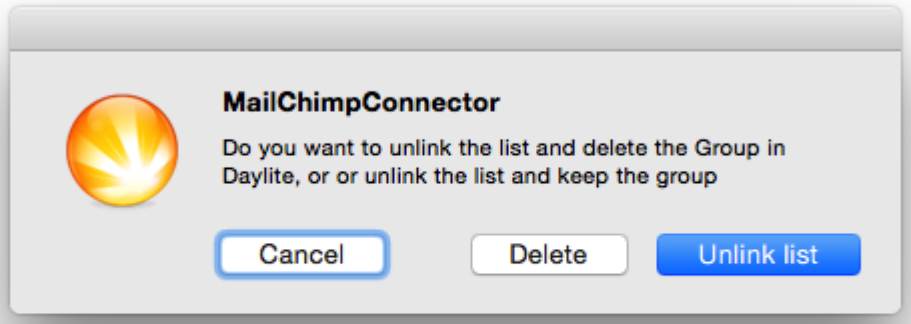
1. Select the desired list



2. Click Delete Group in Daylite



3. Select **Delete** if you would like to remove the link to the corresponding MailChimp list *AND* the Daylite group itself. Select **Unlink list** if you would like to remove the link to the corresponding MailChimp list but want to keep the Daylite group.

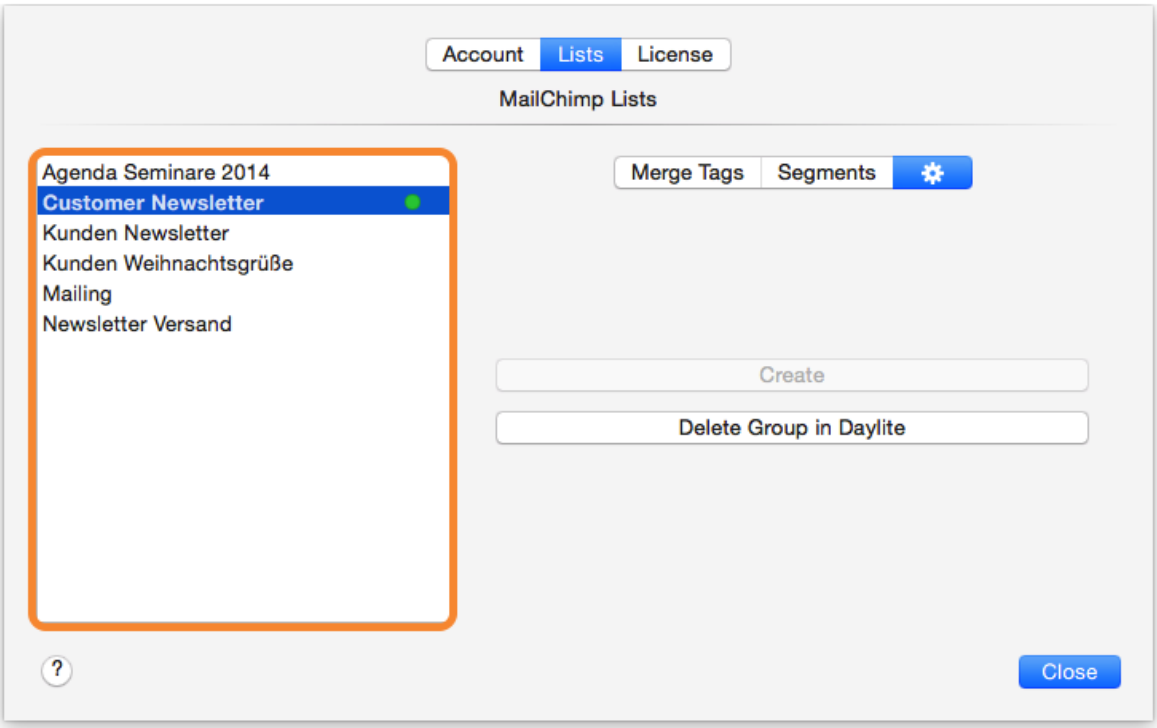


Manage Merge Tags

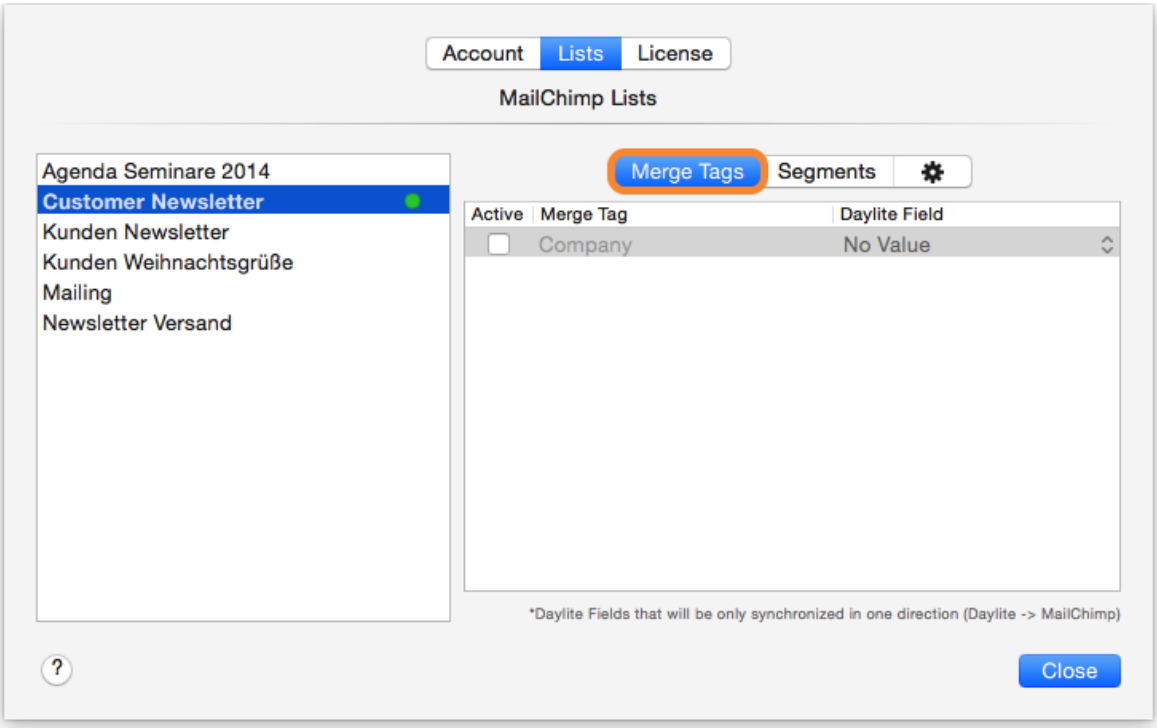
MailChimp supports the usage of merge tags to populate your campaign with dynamic content. If you are unfamiliar with the term 'merge tag', you'll find more information at www.mailchimp.com.

By default the merge tags for 'first name', 'last name' and 'email address' are linked to the corresponding fields in Daylite. So, if you want to use just these tags you are all set already! If you would like to use other Daylite fields, use the following steps as a reference. After adding the desired merge tags on www.mailchimp.com manage them in Daylite:

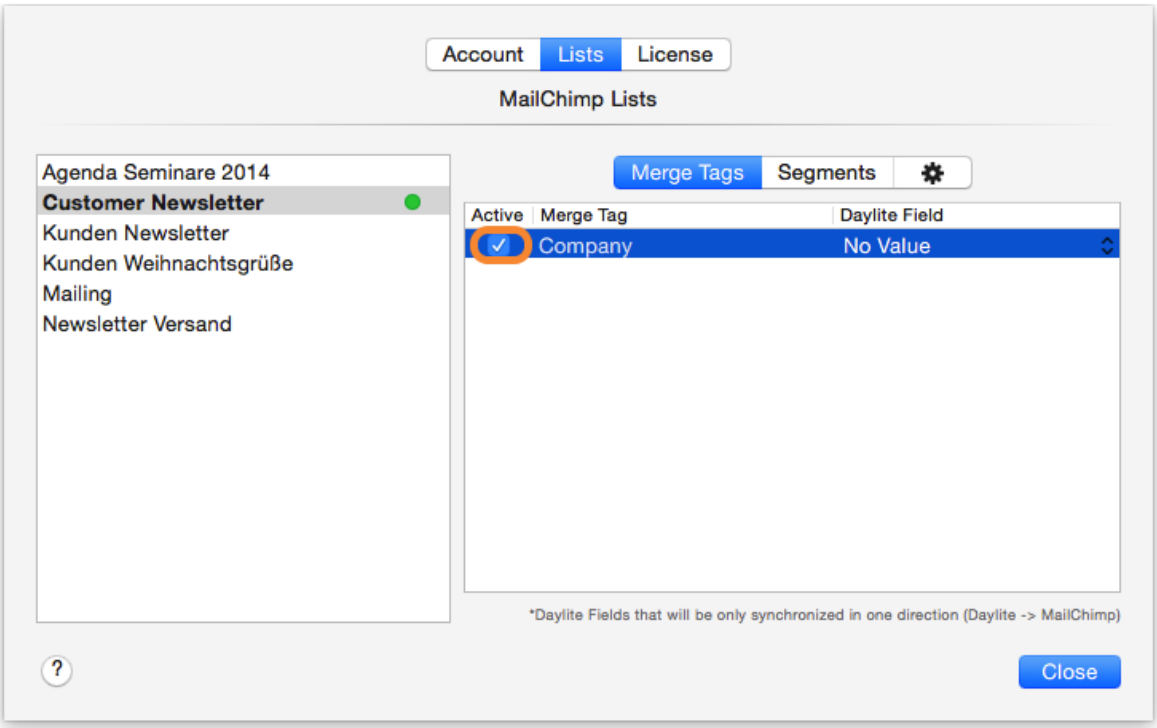
1. Select a list. Please note: the list needs to be imported to Daylite first (please refer to chapter Importing a MailChimp List as a Group in Daylite)



2. Select the tab **Merge Tags**

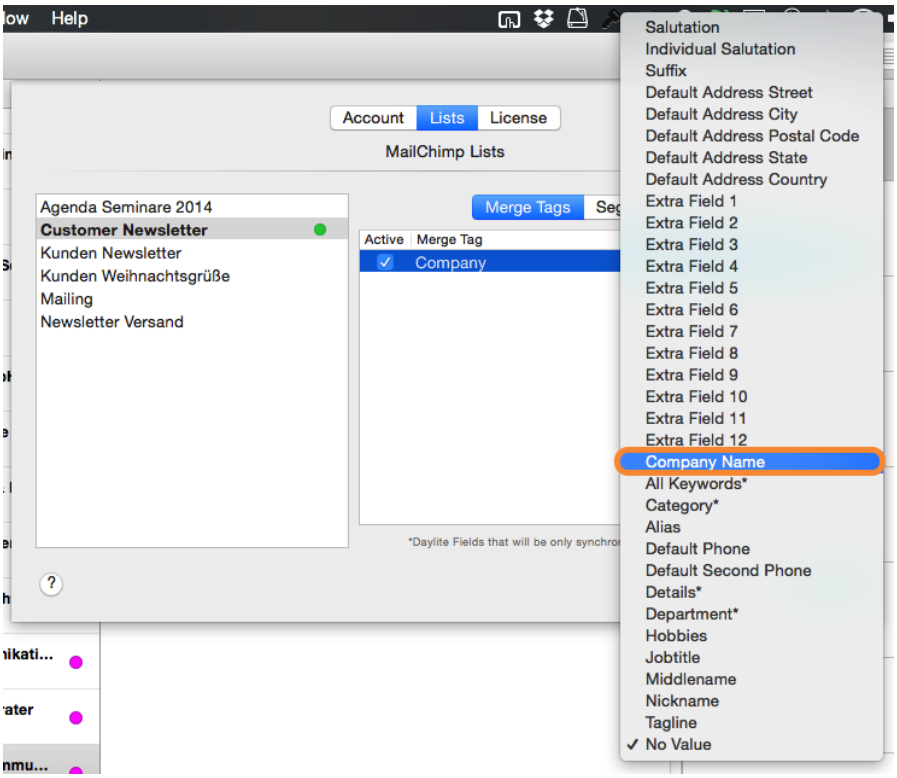


3. The tab shows all merge tags you have configured for the particular list. To use a specific merge tag, check the box in column **Active** accordingly



4. Select the desired Daylite field in the **Daylite Field** column drop-down menu, which you would like to assign to the particular merge tag

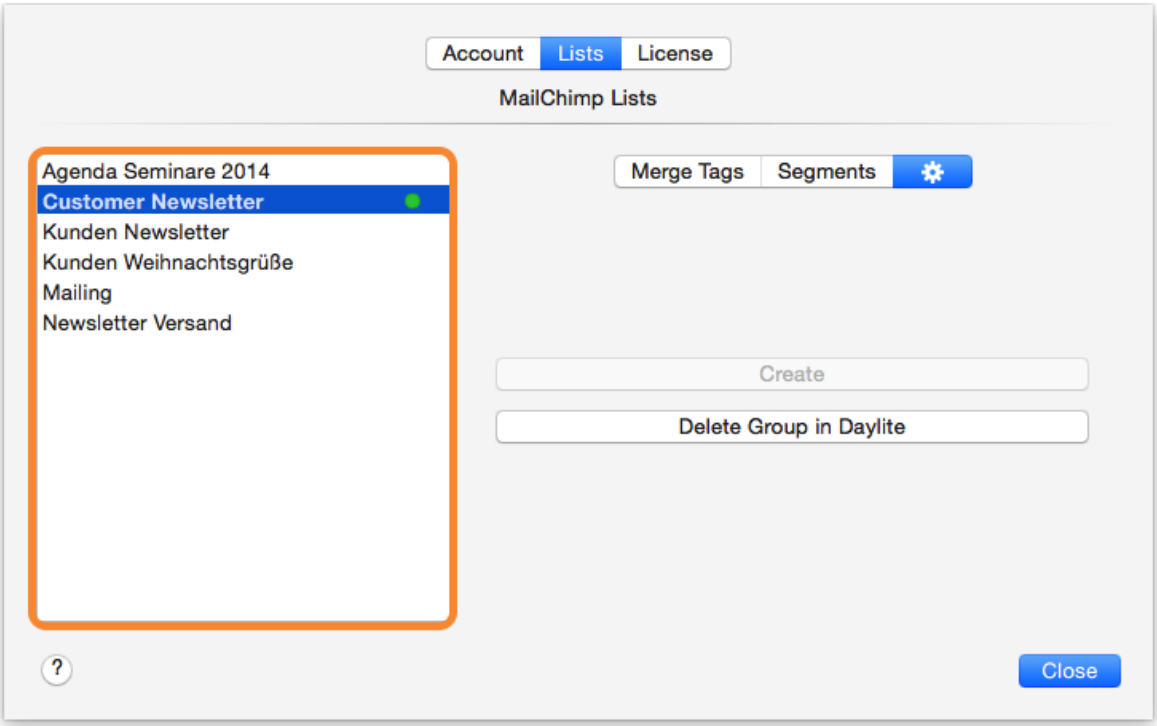
Please note: Daylite fields denoted by an asterisk will not be synchronized both ways, i.e. data is being transferred from Daylite to MailChimp but changes on mailchimp.com will not be sync'ed back to Daylite



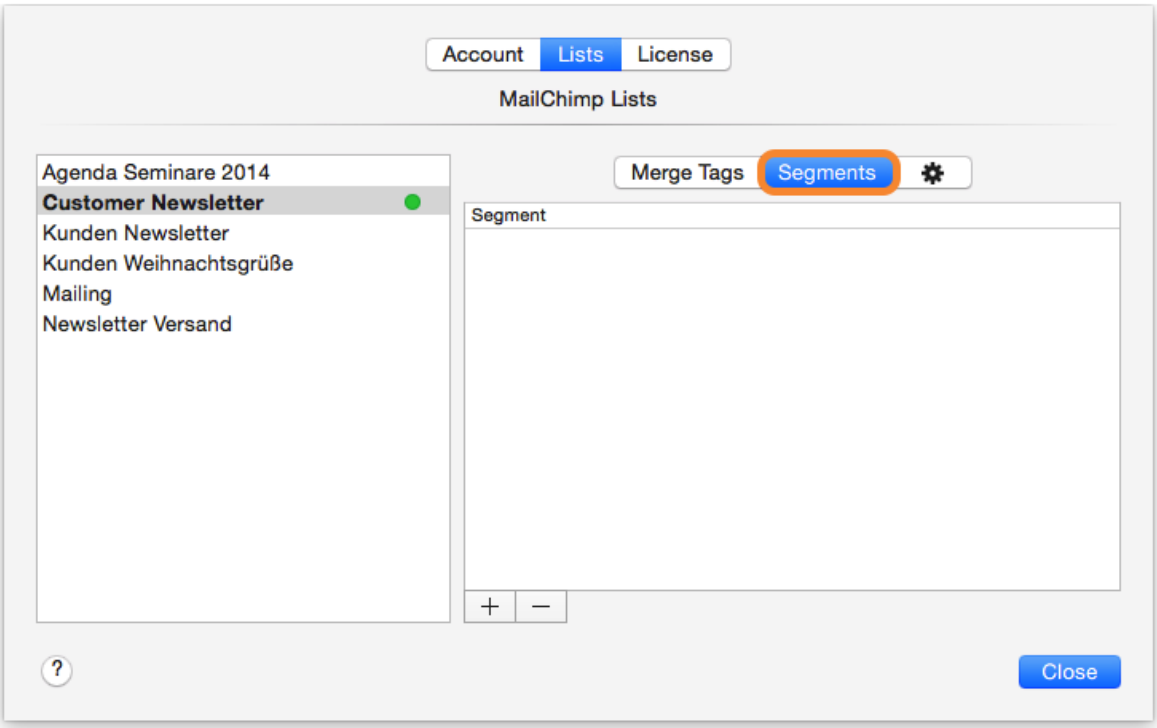
Managing Segments

MailChimp supports the option to divide your mailing list into segments. If you are unfamiliar with this option, please refer to this article at www.mailchimp.com.

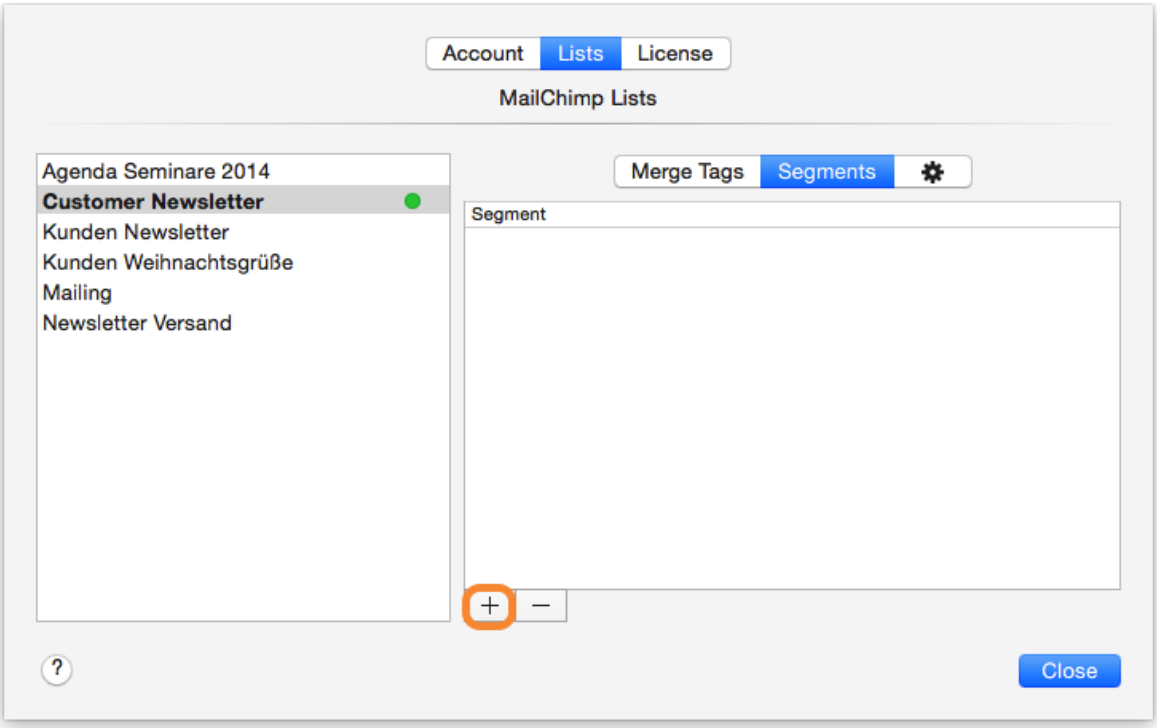
1. Select a list. Please note: the list needs to be imported to Daylite first (please refer to chapter Importing a MailChimp List as a Group in Daylite)



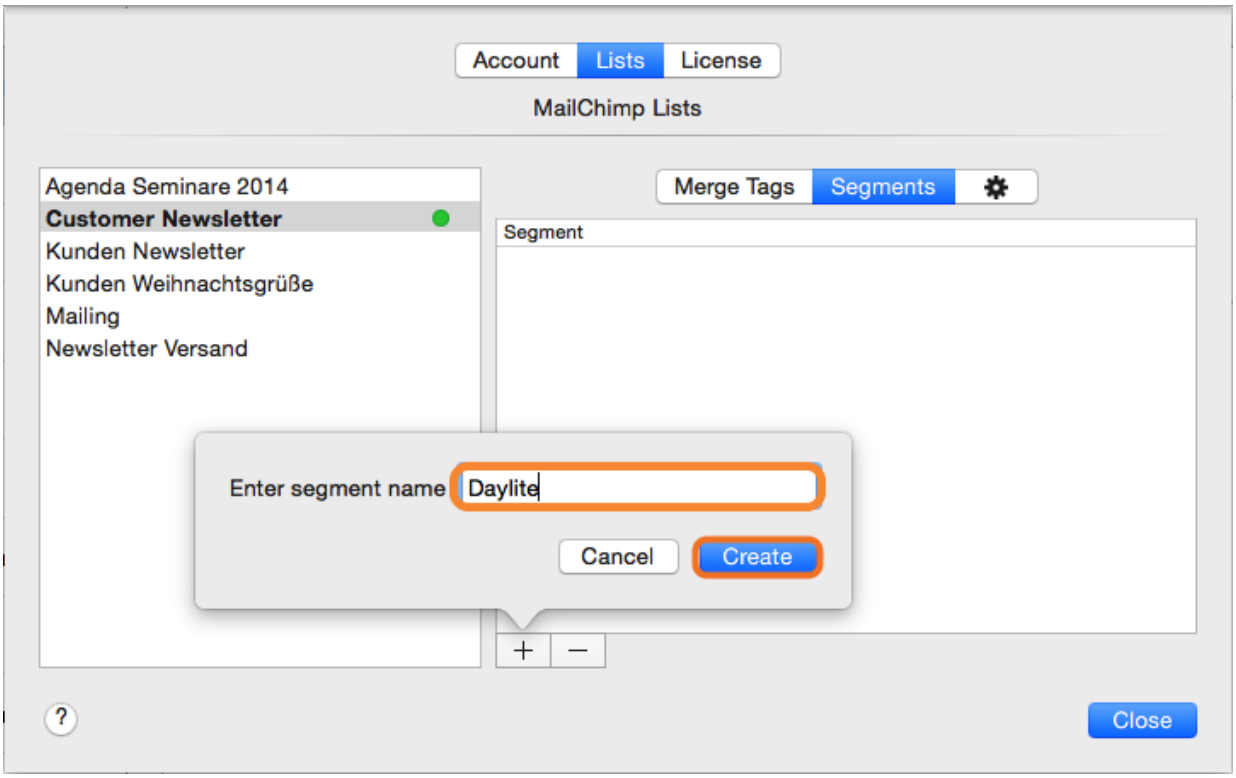
2. Select the Segments tab



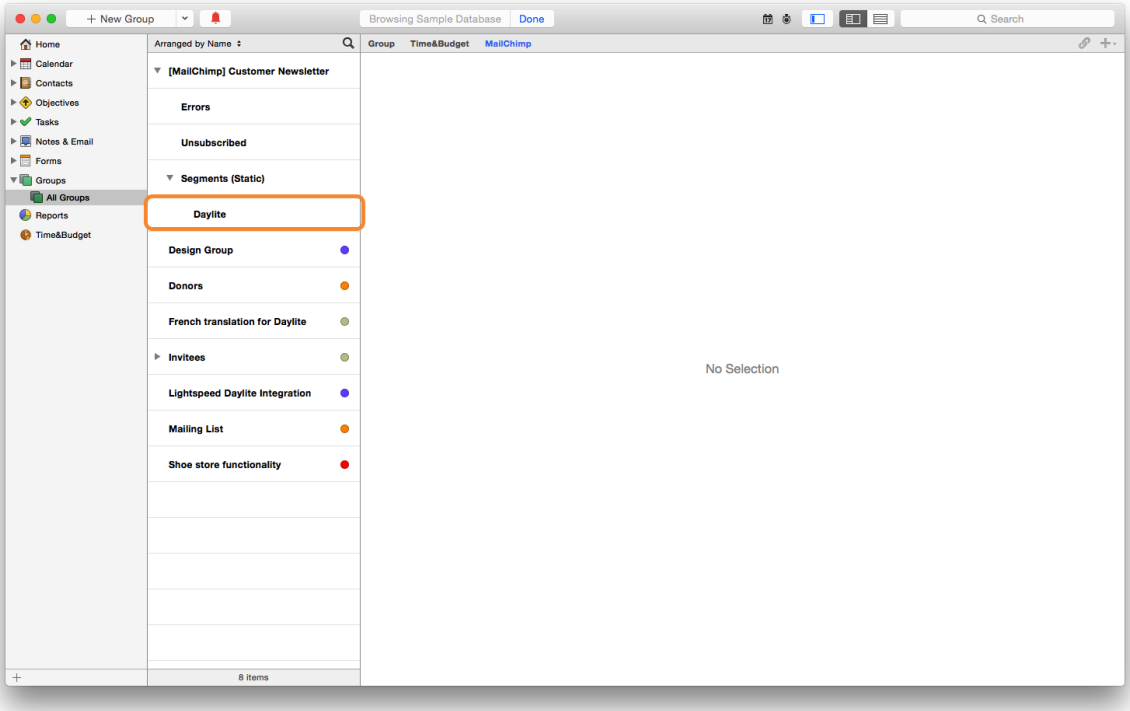
3. To add a segment click the **Plus Sign**



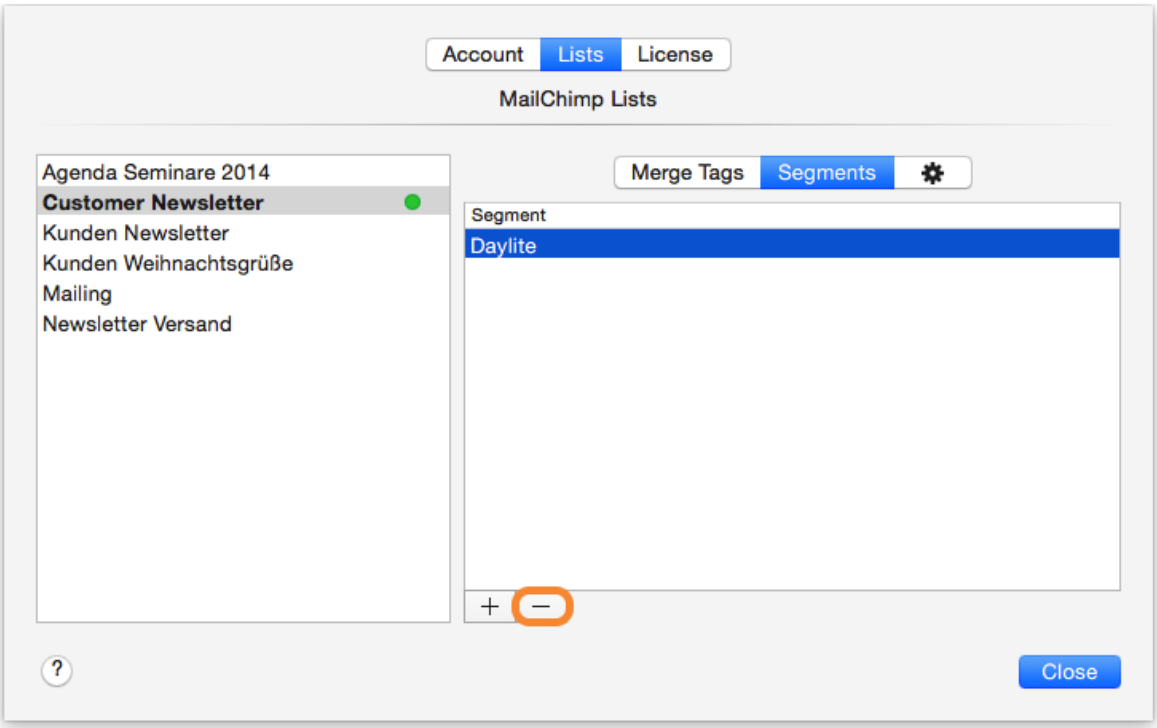
4. Enter the desired name for the segment and click **Create**



5. In your MailChimp group a new subgroup with the name chosen in step 4 is being created within the 'Segments (Static)' subgroup



6. To delete a segment select it and click the **Minus Sign**


Account
Lists
License
MailChimp Lists
Agenda Seminare 2014
Customer Newsletter
Kunden Newsletter
Kunden Weihnachtsgrüße
Mailing
Newsletter Versand
Merge Tags
Segments
Segment
Daylite
Close

Sync between a Daylite Group and a MailChimp List

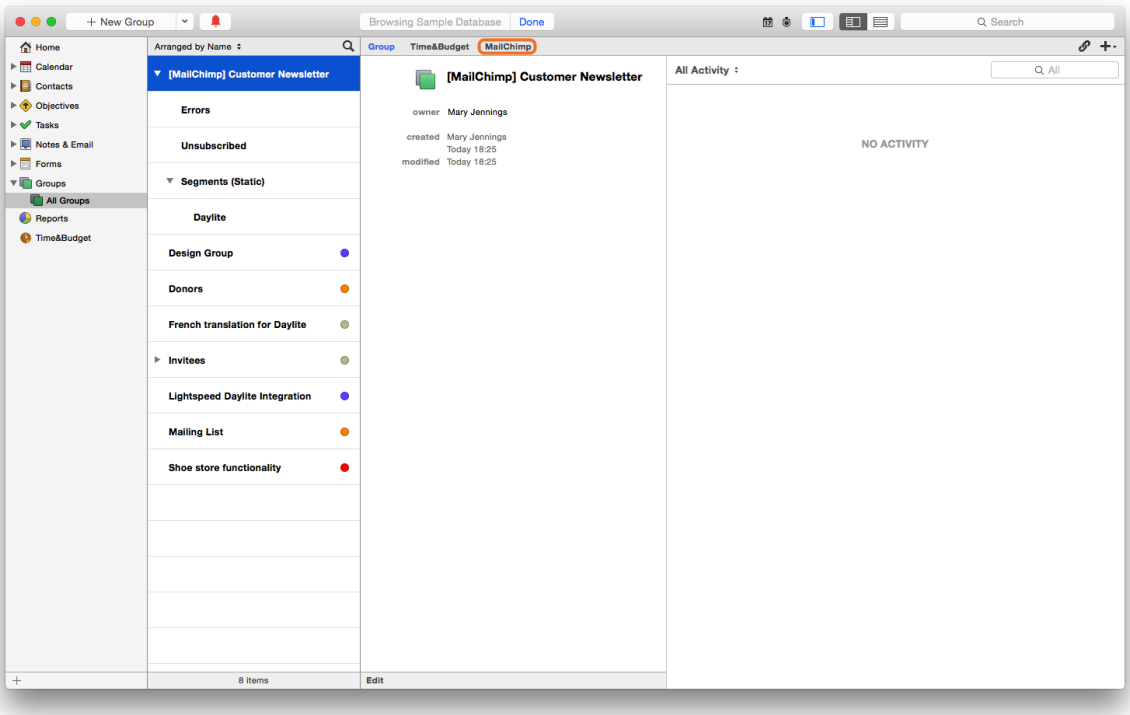
By using MailChimpConnector to sync between Daylite and MailChimp it is possible to create new contacts, update existing contacts and also subscribe or unsubscribe a person. MailChimpConnector keeps your contacts in a MailChimp list and the corresponding Daylite group synchronized. When you edit a person in Daylite, e.g. change the person's email address, the change finds its way to this person on the MailChimp list.

There is one exception though: members of a segment subgroup should solely be managed in Daylite. Contacts added to a segment on MailChimp won't be synced with Daylite. You'll find more info on this matter later on in this chapter.

Performing a Sync

1. Select the group you would like to sync

2. Click the **MailChimp** tab



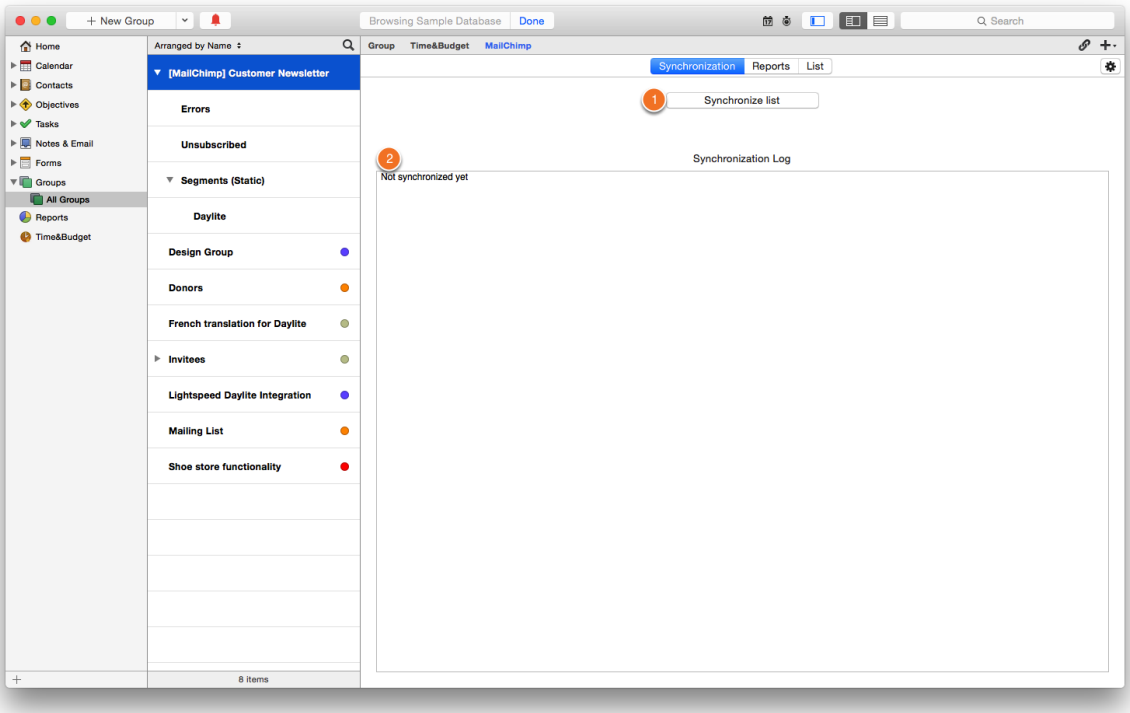
3. Select the **Synchronization** tab

This tab provides the following features:

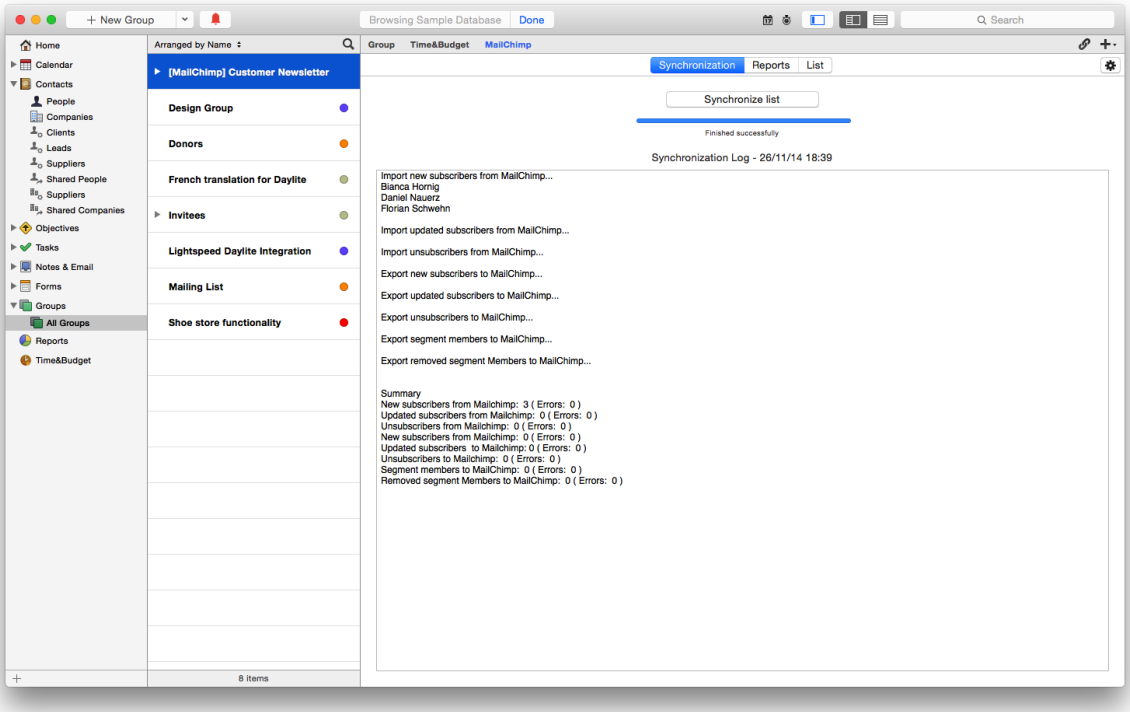
(1) A click on the 'Synchronize list' starts the sync process

(2) The lower part of the tab shows the last sync log. During a sync it shows information regarding the current sync process

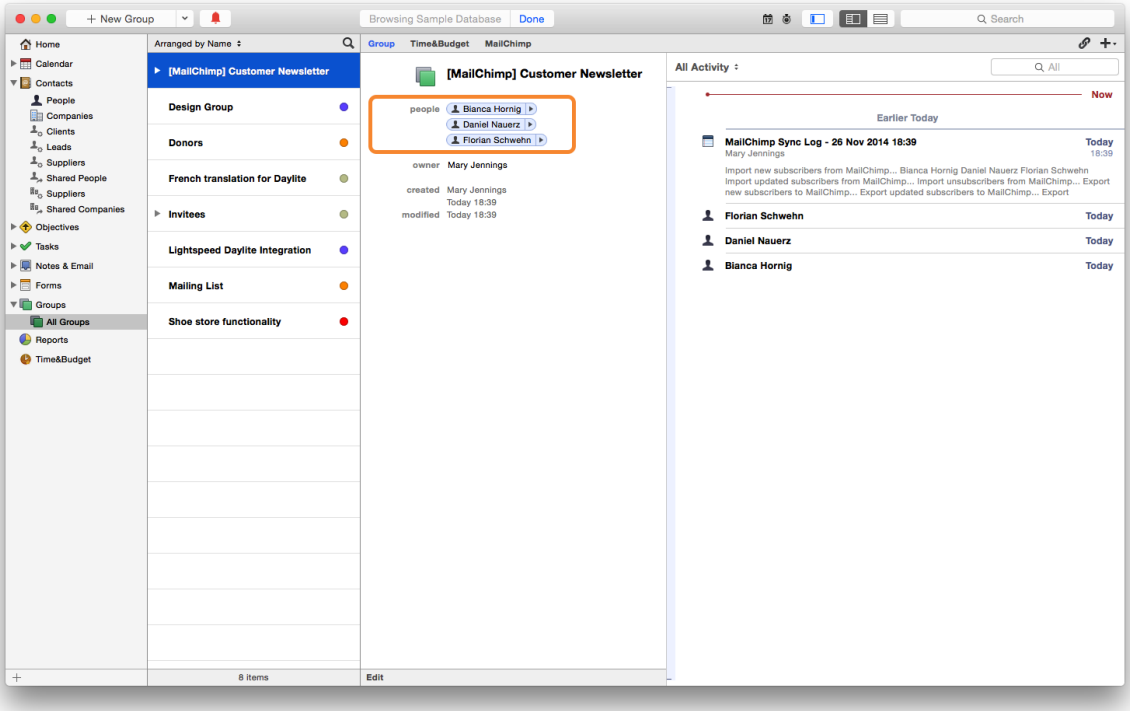
Click **Synchronize list** to start the sync process



4. The group is now being updated. In case a new person is being created, the log will indicate details



5. New contacts will be automatically assigned to the group and show together with existing contacts

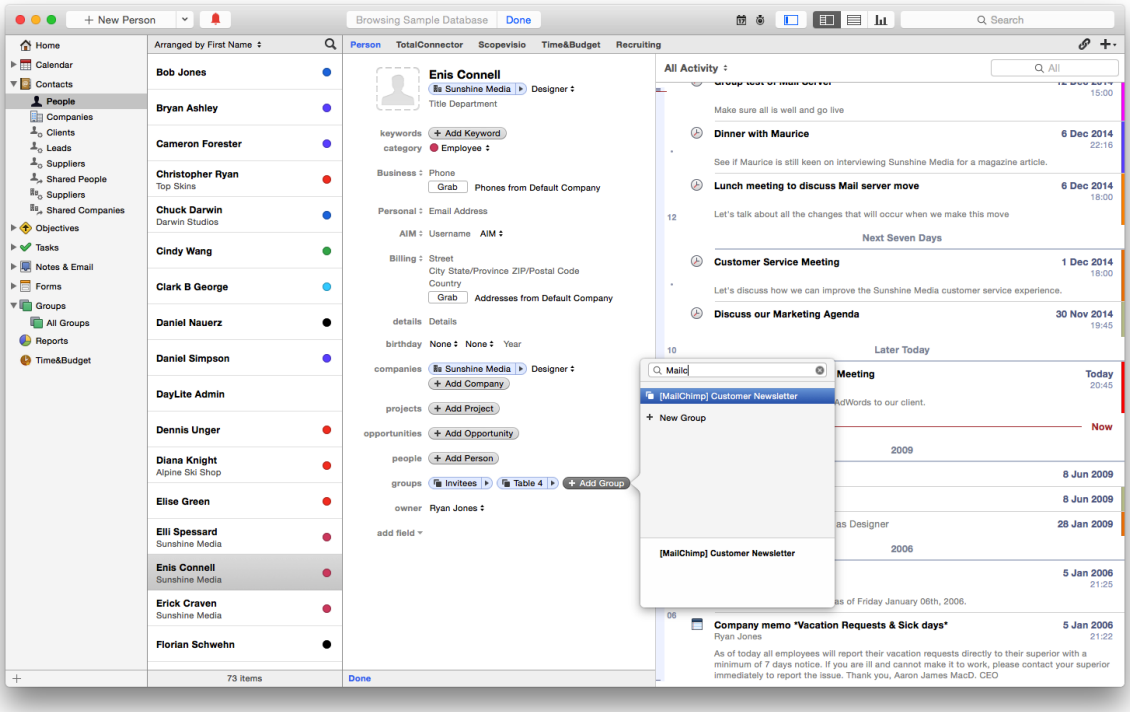


Add Daylite Contacts to a MailChimp Group

Please note: There are different ways to link a contact or even multiple contacts at once to a group in Daylite. The following steps are just an example.

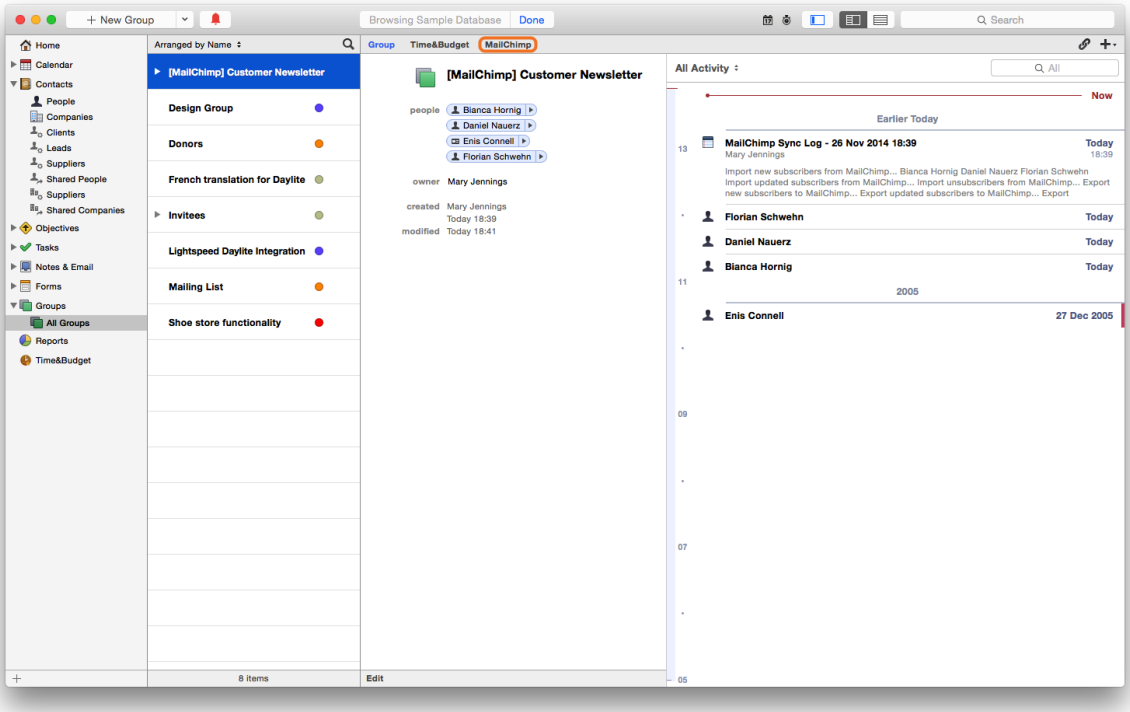
1. Select the contact you would like to add to a MailChimp group

2. Click the **Add Group** dialog to link the contact to the desired group



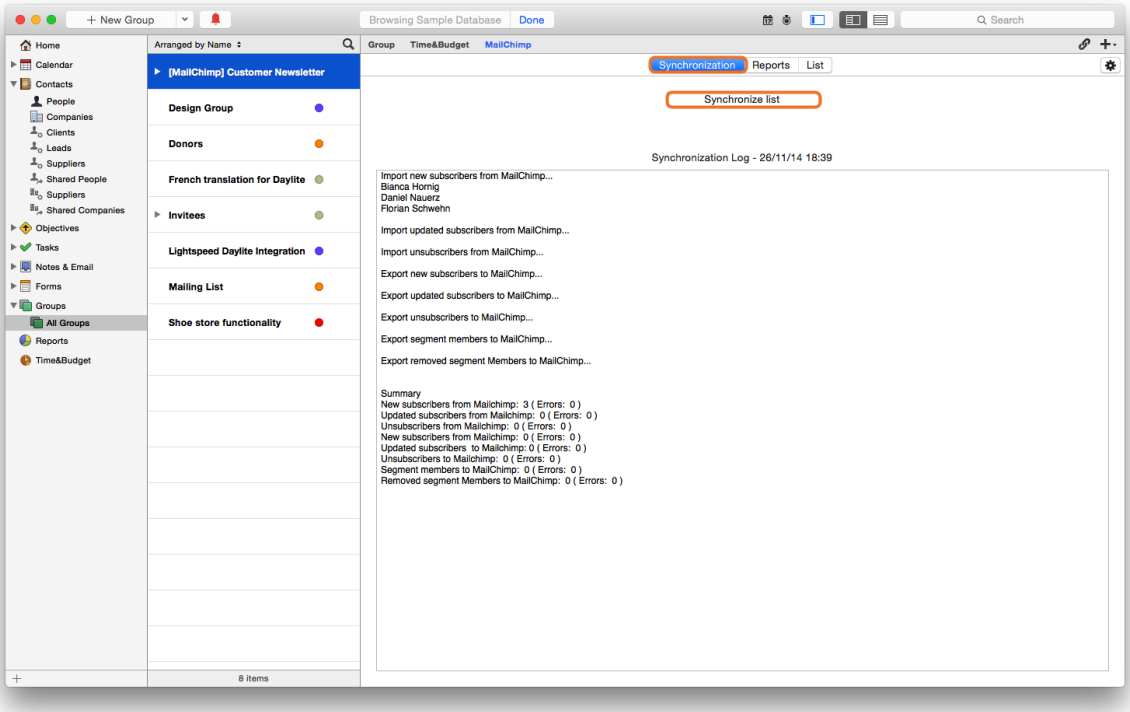
3. Navigate to the group the contact has been linked to

4. Select the **MailChimp** tab

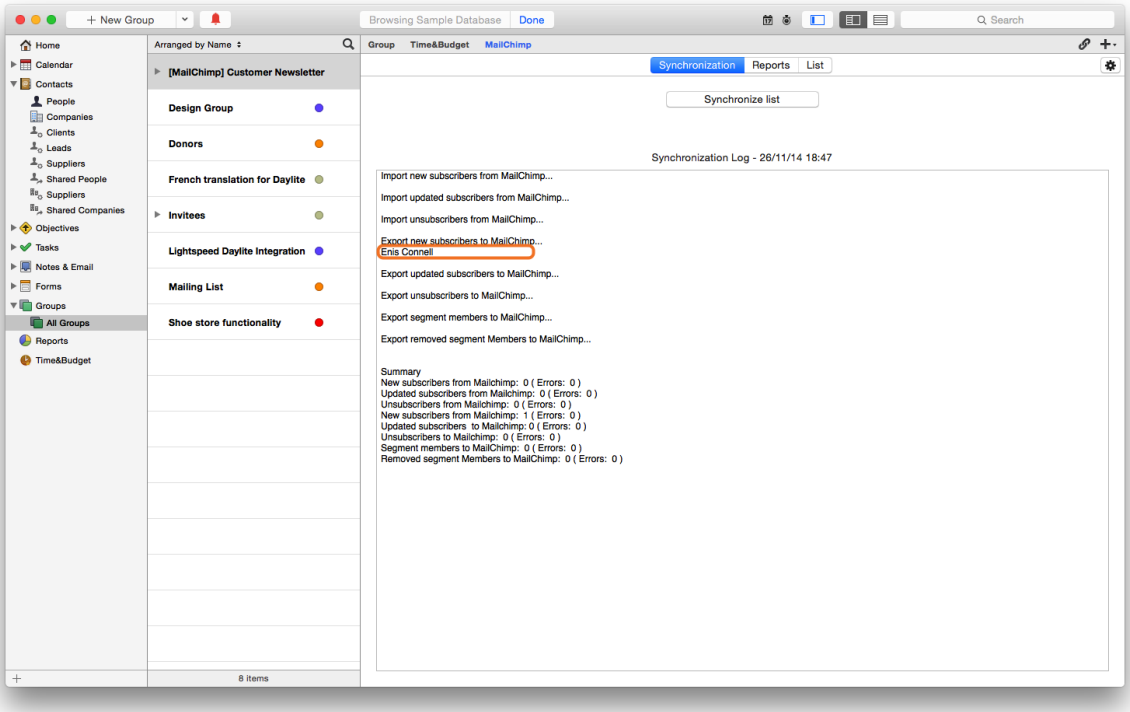


5. Click **Synchronization**

6. Click **Synchronize list**



7. The log will indicate whether the sync has been successful


New Group
Browsing Sample Database
Done
Search
Home
Calendar
Contacts
People
Companies
Clients
Leads
Suppliers
Shared People
Suppliers
Shared Companies
Objectives
Tasks
Notes & Email
Forms
Groups
All Groups
Reports
Time&Budget
Arranged by Name
[MailChimp] Customer Newsletter
Design Group
Donors
French translation for Daylite
Invitees
Lightspeed Daylite Integration
Mailing List
Shoe store functionality
8 items
Group
Time&Budget
MailChimp
Synchronization
Reports
List
Synchronize list
Synchronization Log - 26/11/14 18:47
Import new subscribers from MailChimp...
Import updated subscribers from MailChimp...
Import unsubscribers from MailChimp...
Export new subscribers to MailChimp...
Enis Connell
Export updated subscribers to MailChimp...
Export unsubscribers to MailChimp...
Export segment members to MailChimp...
Export removed segment Members to MailChimp...
Summary
New subscribers from Mailchimp: 0 (Errors: 0)
Updated subscribers from Mailchimp: 0 (Errors: 0)
Unsubscribers from Mailchimp: 0 (Errors: 0)
New subscribers from Mailchimp: 1 (Errors: 0)
Updated subscribers to Mailchimp: 0 (Errors: 0)
Unsubscribers to Mailchimp: 0 (Errors: 0)
Segment members to MailChimp: 0 (Errors: 0)
Removed segment Members to MailChimp: 0 (Errors: 0)

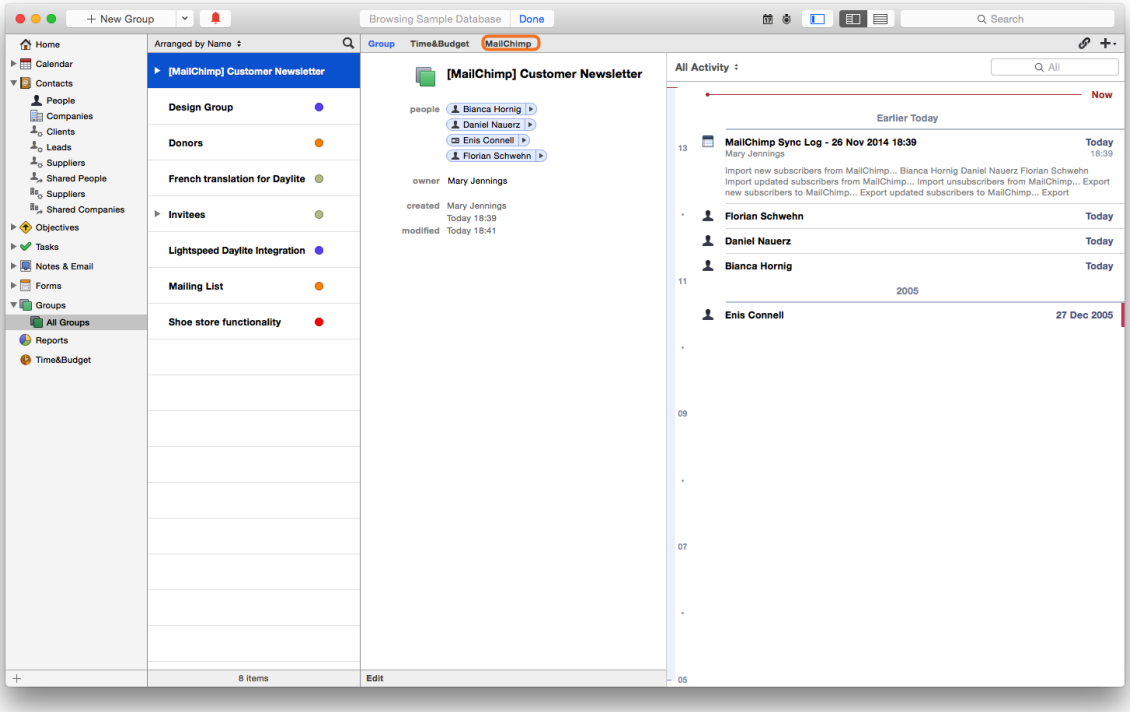
View MailChimp Reports in Daylite

With only one clicl you can view MailChimp reports regarding your campaigns. Reports contain information on open and click rates. You'll find more information on that matter at [www.mailchimp.com.](http://www.mailchimp.com)

View a report

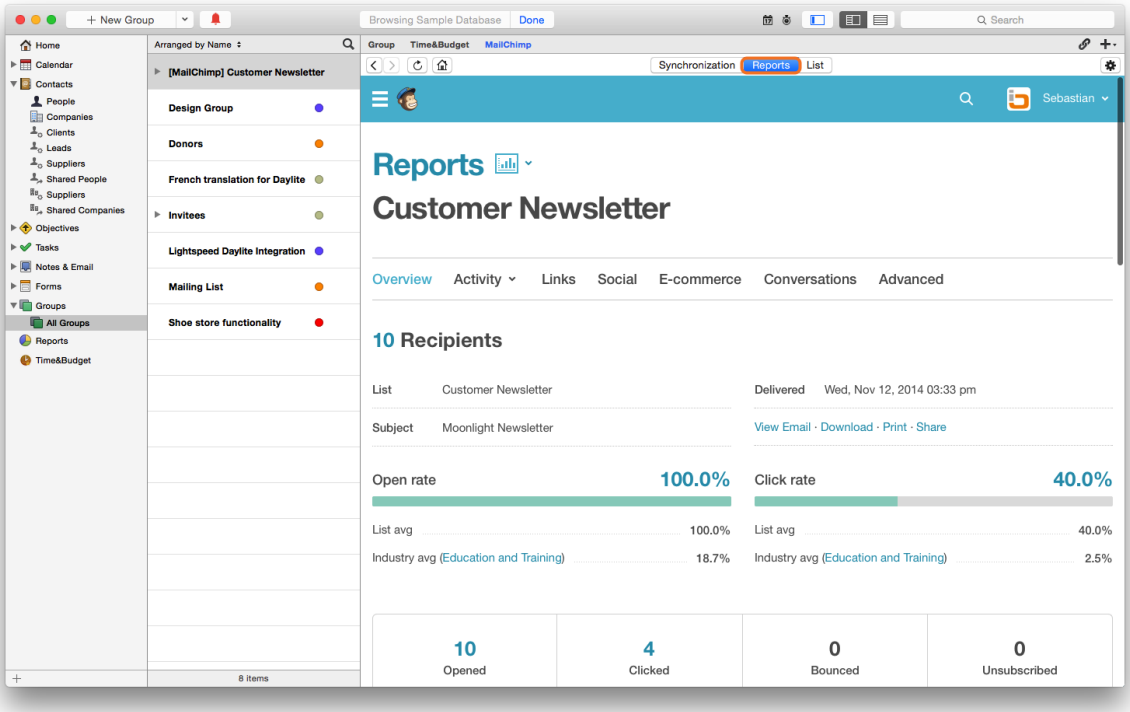
1. Select the desired group

2. Click the **MailChimp** tab



3. Click **Reports**

Select the desired campaign and report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[MailChimp] Customer Newsletter
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Invitees
Lightspeed Daylite Integration
Mailing List
Shoe store functionality
8 items
Group
Time&Budget
MailChimp
Synchronization
Reports
List
Sebastian
Reports
Customer Newsletter
Overview
Activity
Links
Social
E-commerce
Conversations
Advanced
10 Recipients
List
Customer Newsletter
Delivered
Wed, Nov 12, 2014 03:33 pm
Subject
Moonlight Newsletter
View Email · Download · Print · Share
Open rate
100.0%
Click rate
40.0%
List avg
100.0%
List avg
40.0%
Industry avg (Education and Training)
18.7%
Industry avg (Education and Training)
2.5%
10
Opened
4
Clicked
0
Bounced
0
Unsubscribed

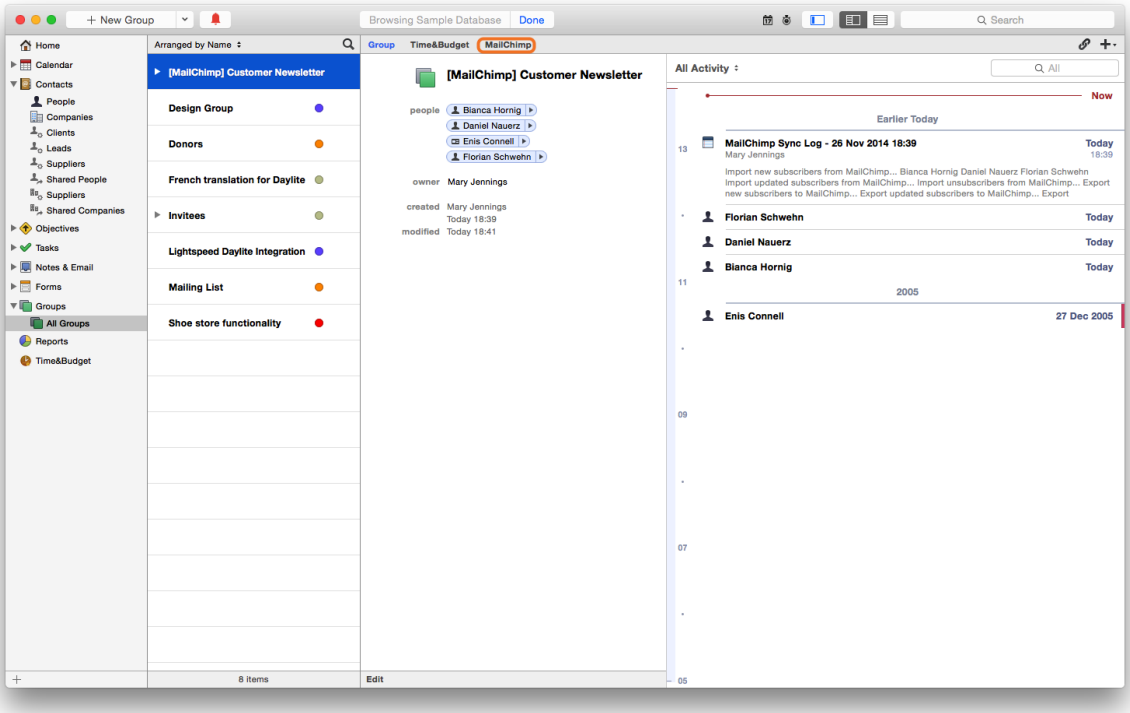
Edit MailChimp lists in Daylite

You can edit MailChimp lists from within Daylite. This means that you can, for example, create merge without leaving the Daylite window.

To edit lists, follow these steps:

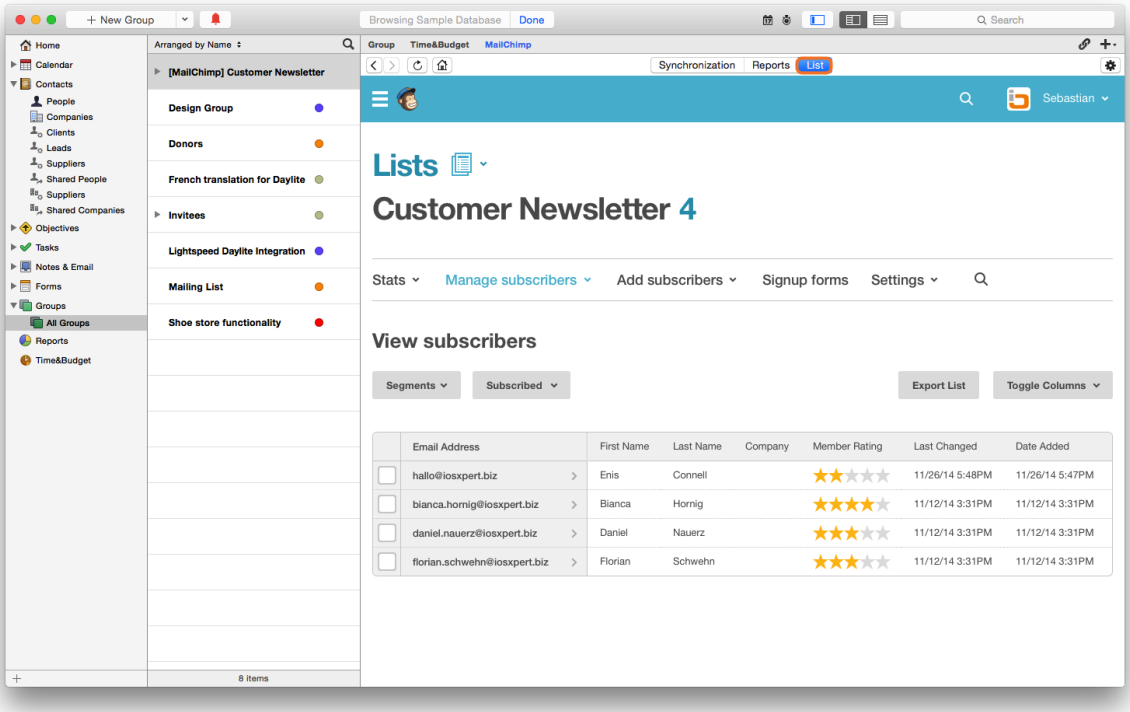
1. Select the desired list

2. Click the **MailChimp** tab



3. Click **Lists**

You will now see all you MailChimp lists. Select the list you would like to edit.


New Group
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Shared People
Suppliers
Shared Companies
Objectives
Tasks
Notes & Email
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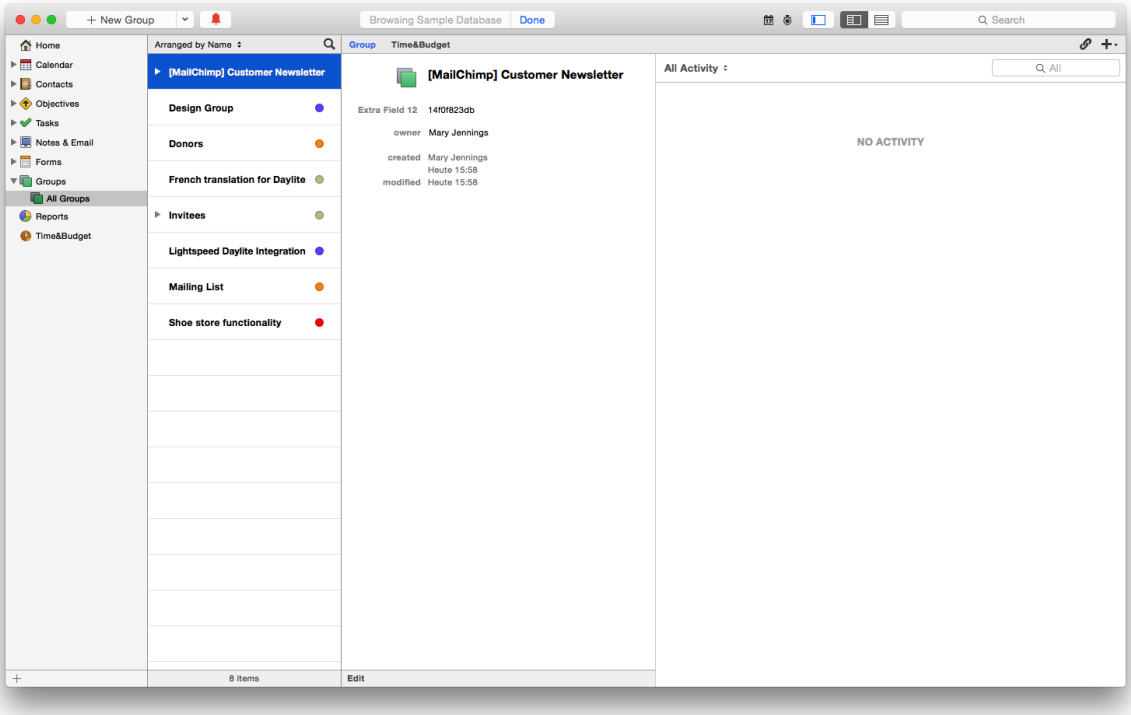
Groups
All Groups
Reports
Time&Budget
Arranged by Name
[MailChimp] Customer Newsletter
Design Group
Donors
French translation for Daylite
Invitees
Lightspeed Daylite Integration
Mailing List
Shoe store functionality
8 items
Group
Time&Budget
MailChimp
Synchronization
Reports
List
Sebastian
Lists
Customer Newsletter 4
Stats
Manage subscribers
Add subscribers
Signup forms
Settings
View subscribers
Segments
Subscribed
Export List
Toggle Columns
Email Address
First Name
Last Name
Company
Member Rating
Last Changed
Date Added
hallo@iosxpert.biz
Enis
Connell
11/26/14 5:48PM
11/26/14 5:47PM
bianca.hornig@iosxpert.biz
Bianca
Hornig
11/12/14 3:31PM
11/12/14 3:31PM
daniel.nauerz@iosxpert.biz
Daniel
Nauerz
11/12/14 3:31PM
11/12/14 3:31PM
florian.schwehn@iosxpert.biz
Florian
Schwehn
11/12/14 3:31PM
11/12/14 3:31PM

Migrating from MailChimpConnector 2.x

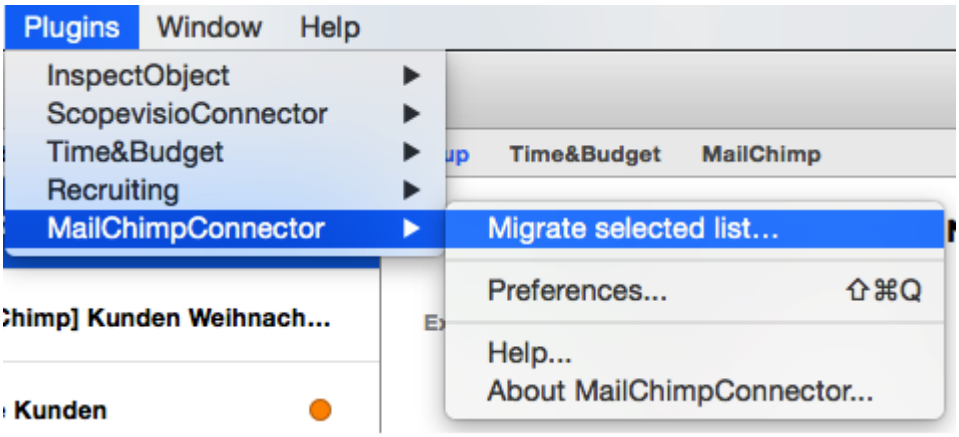
If you have been using MailchimpConnectors version 2.x, you need to migrate the MailChimp groups in Daylite before you can use MailChimp version 3.

To migrate follow these steps:

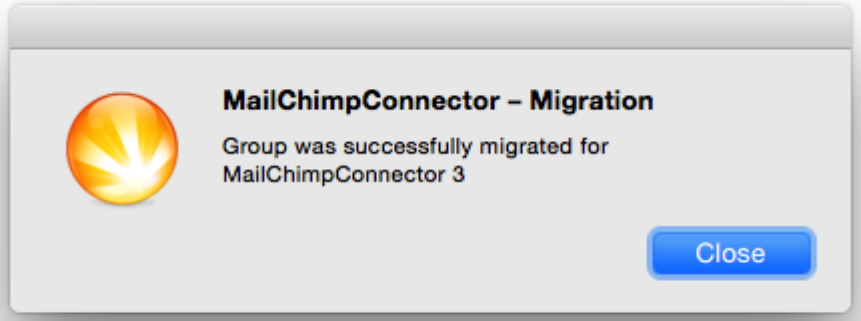
1. Select the desired group you would like to migrate



3. In the Daylite manu navigate to Plugins -> MailChimpConnector and select the option 'Migrate selected list...'



After the successful migration you can use this group with MailChimpConnector 3.

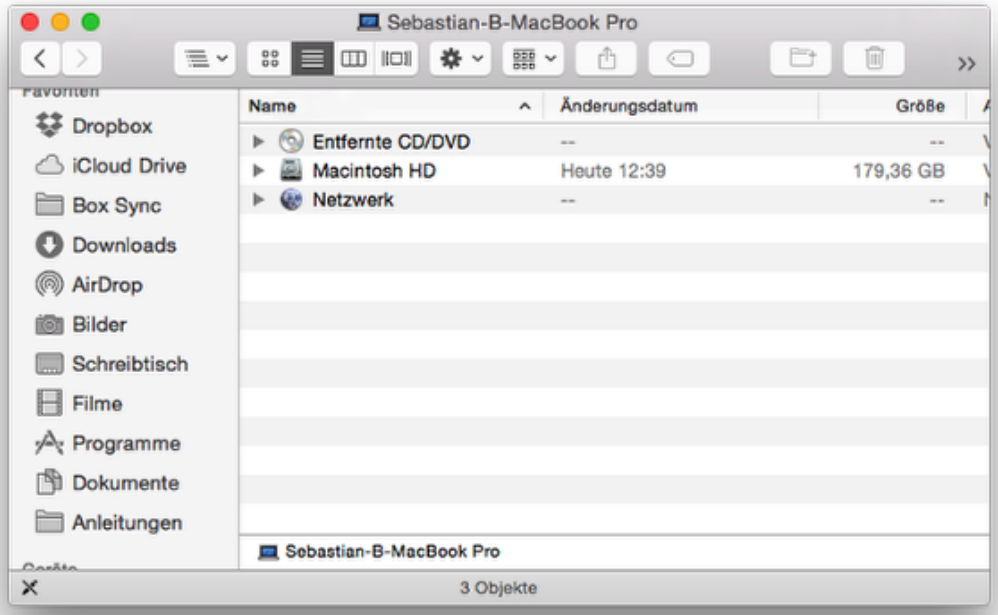


Miscellaneous

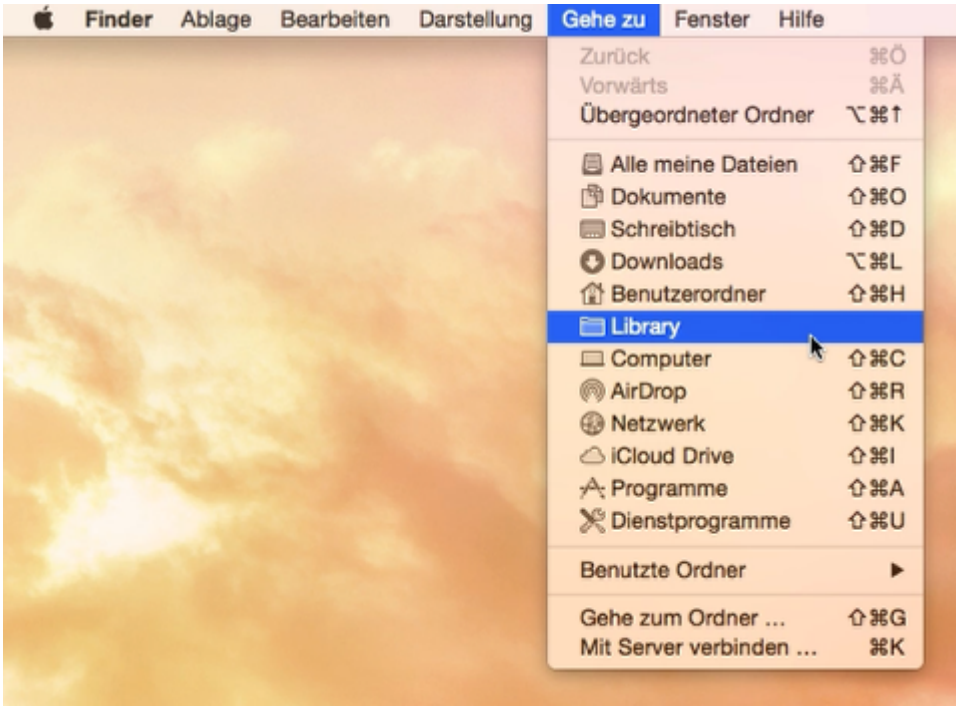
Removing the Plugin

Follow these steps to deinstall a Daylite plugin

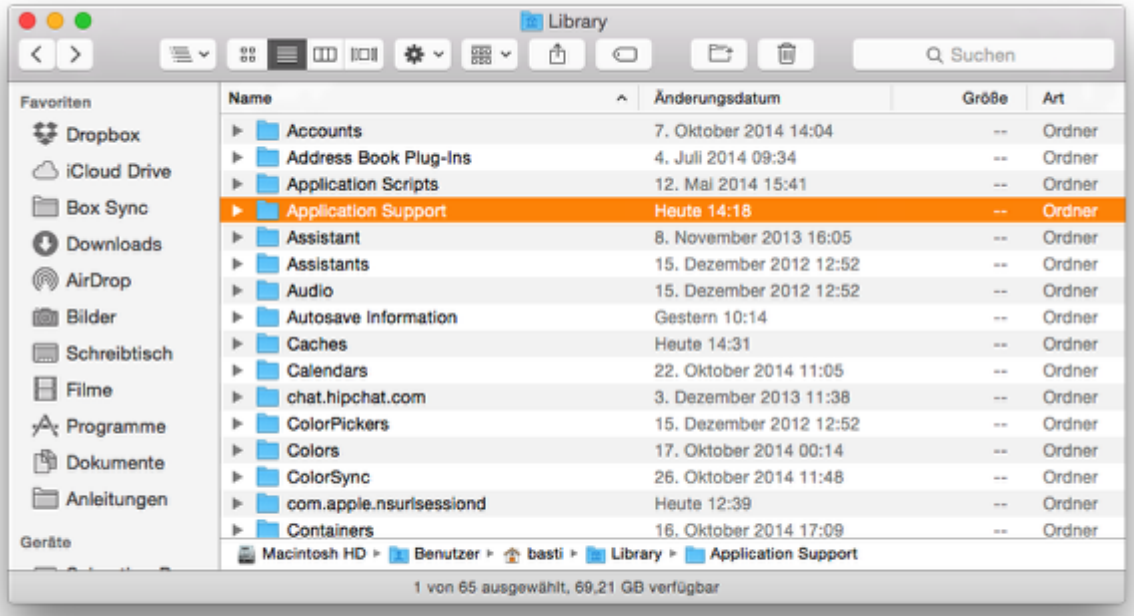
1. Open Finder



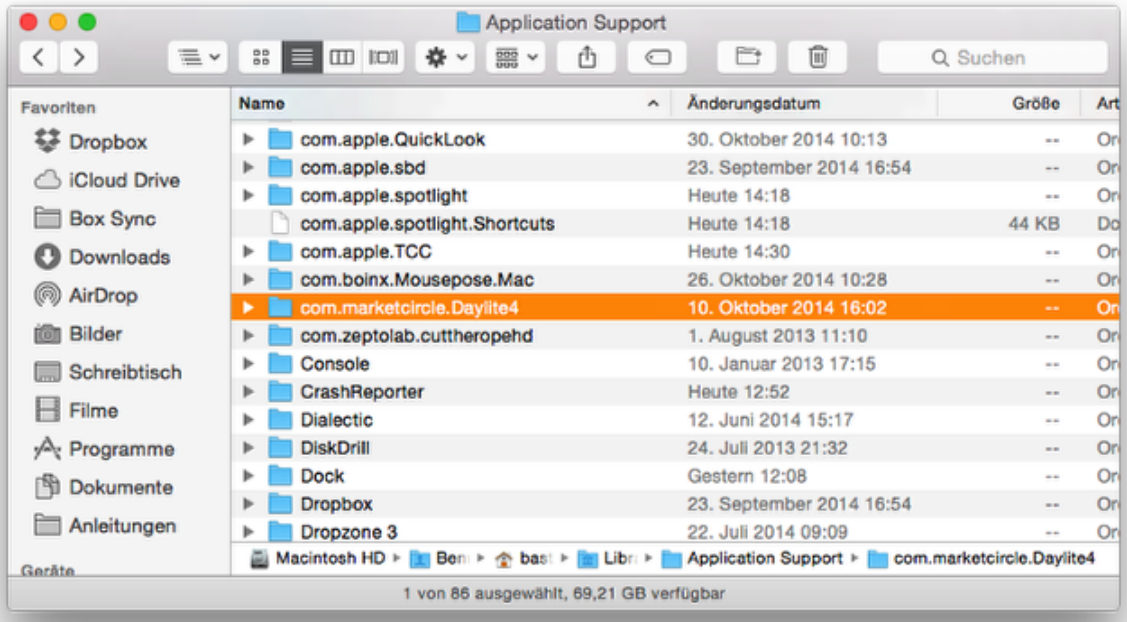
2. In the menu bar select **Go** and hold down the ⌥ **alt key**. The **Library** folder will appear



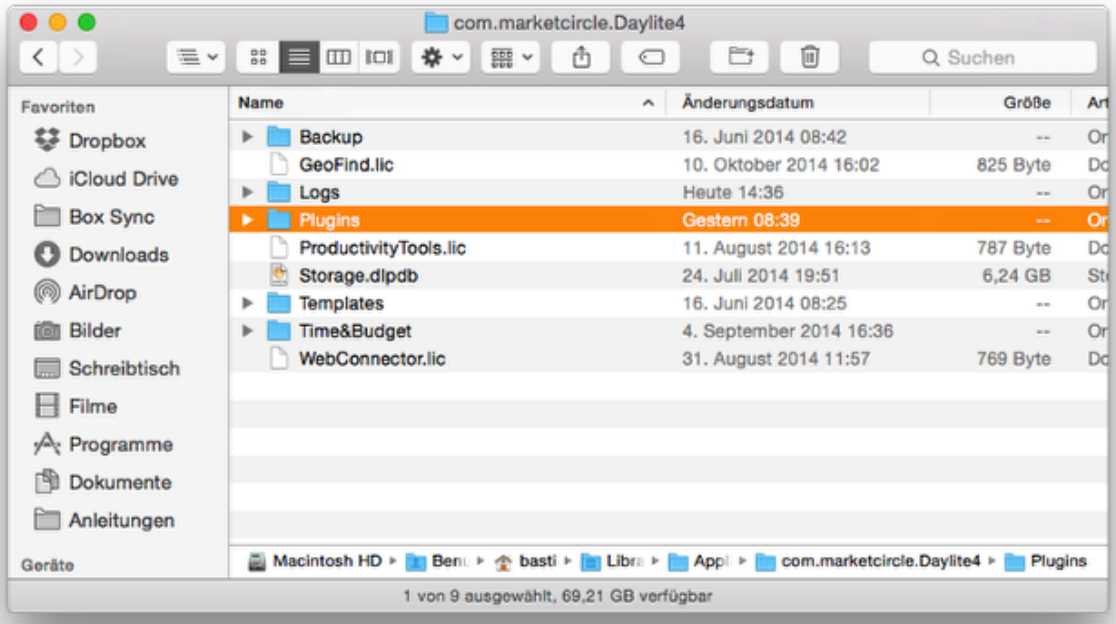
4. Navigate to the folder **Application Support** ->



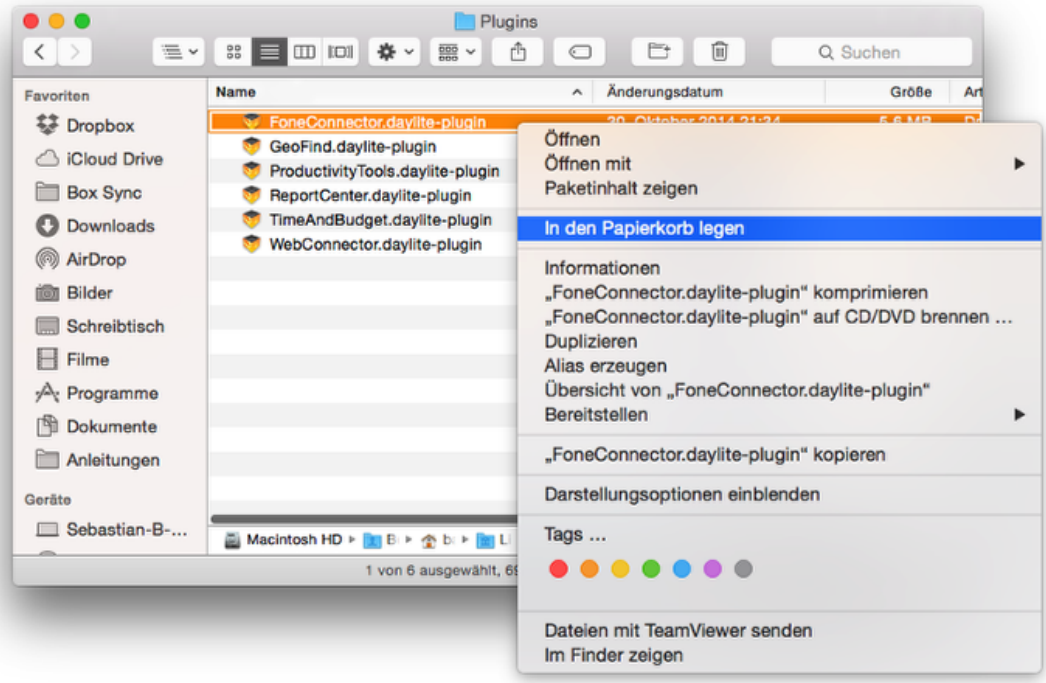
5. -> **com.marketcircle.Daylite4** ->



6. -> Plugins



7. Delete the file **mailchimpplugin.daylite-plugin**



8. Restart Daylite