Case:

Zapier-integration between MailChimp and webCRM at Azalea IT

Zapier is an integration platform which allows you to connect more than 1500 apps without writing even a snippet of code.

Check out which apps you can access on Zapier her: Zapier apps

Access webCRM on Zapier by testing the system for free for 2 weeks or by logging on to your account.

This integration requires a webCRM PLUS or ENTERPRISE license as well as an account with Zapier and MailChimp.

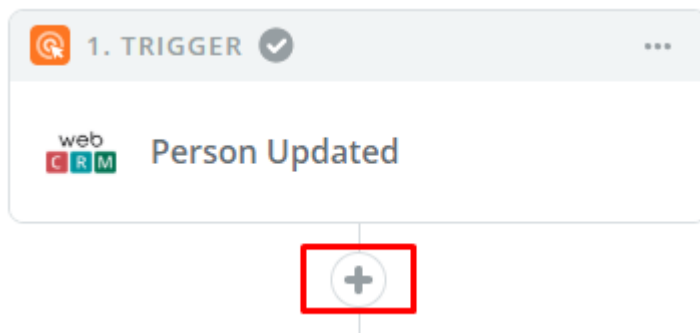# Zapier-integration between MailChimp and webCRM at Azalea IT

At Azalea IT (www.azaleait.se), they are using Zapier to synchronize MailChimp and webCRM. When they create new contacts in webCRM with a check mark in the box for newsletter subscription, they are automatically added to the mailing list in MailChimp. And vice versa: When a contact unsubscribes in MailChimp, that information is automatically updated in webCRM.

How to set up these Zaps:

To link MailChimp and webCRM, you must create two Zaps: One that sends new, respectively updated newsletter subscribers in webCRM to MailChimp, and one that updates contacts in webCRM from MailChimp if they have unsubscribed via MailChimp.

1. Send contacts from webCRM to MailChimp:

1.1   Set up webCRM with the "trigger" Person Updated/Created.

1.2   Add a Filter by clicking "+" between the webCRM "trigger" and the "Add a Step" box. See picture:

1.3   In the filter, add Only Continue if ... Person "field in webCRM containing the newsletter markup" and (Text) Contains = true. See the example in Picture 1.

To find the field you use in webCRM to select newsletters for contacts, go to System Configuration -> Custom Fields -> Contacts. In the last column, you will find the ID number of the field. If it is a customized field, use the number and search the Zapier filter for Custom field (followed by the number).

If it is one of the checkboxes at the bottom of the Custom Fields page, look for Check Mark (followed by the number in the right-hand column of the webCRM). See picture 2:

1.4   Then add a step for MailChimp, Add / Update Subscriber.

Follow the instructions to link your MailChimp account to Zapier.

In "Edit template", select the MailChimp list that the person should be added to and the field from webCRM that should be mapped to a field in MailChimp. You can also choose what should happen if the person is already registered in MailChimp: Whether it should be updated or skipped.

If you do not have a Zap that updates persons in webCRM as unsubscribed from MailChimp, we recommend you choose "no" when asked whether to update the contact in MailChimp. Otherwise, you risk involuntarily re-subscribing people when you edit and save them in webCRM and they still have a checkmark for "newsletter", even though they have unsubscribed in MailChimp.

Then select "Continue". You can then send a test to MailChimp before you press "Finish" and turn on your Zap.

Now you are done with your first Zap that connects webCRM with MailChimp!

See image for "Edit template":

Set up MailChimp Subscriber

👁 **Setup Preview** Learn more   ON 👁

🐵 **List** (required)

booking   ⌄

🐵 **Subscriber Email** (required)

The email address of the subscriber you want to subscribe to this list. Please don't type an email address in this field, instead this should use a value from a previous step in your Zap. Learn more here.

nils@anderssons.nu   ⊞⊕

🐵 **Double Opt-In** (optional) ⚫ ○

If yes, a confirmation email will be sent to the address before they appear on the chosen list.

                                                                     ⌄

🐵 **Update Existing** (optional) ⚫ ○

If no, the Zap will skip/halt this step if the subscriber exists, otherwise overwrites data sent.

yes   ⌄

2. Update contacts in webCRM from MailChimp:

2.1   Create a Zap with the trigger MailChimp: New Unsubscriber.

Link your MailChimp account and select the list from MailChimp from which to update your webCRM.

2.2   Add a step where you select webCRM and Search Person.

Select Search Person by email and link the MailChimp email field to the Zapier box by clicking the button to the right of the box and select the field from the drop-down list.

Also select "no" to the question "Should we create a new person if the search result is empty?". See picture:

2.3   Then add a new step, which is webCRM: Update Person.

In the "Edit options", link Person ID from the "Search Person" step to the ID field and select "No" in the field that contains the newsletter markup in webCRM (see how to identify the field above).

Then select "Continue".

You can then send a test to webCRM before you press "Finish" and turn on your Zap. See pictures:

Unsubscribe contacts from newsletters in webCRM

If you also want to be able to unsubscribe contacts from newsletters in webCRM and automatically update MailChimp, you need to create one more Zap similar to the first Zap described above (Person updated in webCRM). The difference is that your Zapier filter now contains that the newsletter check box in webCRM does not contain "true", or the box "Block Mass Email" contains "true" (depending on how you register that a contact has unsubscribed from newsletters in webCRM).

The last step in this Zap should be Action: MailChimp "Unsubscribe Email".

You have now linked webCRM and Mailchimp without expensive development costs and without writing a single snippet of code!