

Livestock Office – Mailchimp

7/10/2021

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Mailchimp

Contacts in Livestock Office can be synchronised with Mailchimp.

Details of the Mailchimp account are configured in Company Details.

Contacts are linked to clients and leads and can be flagged to Sync with Mailchimp.

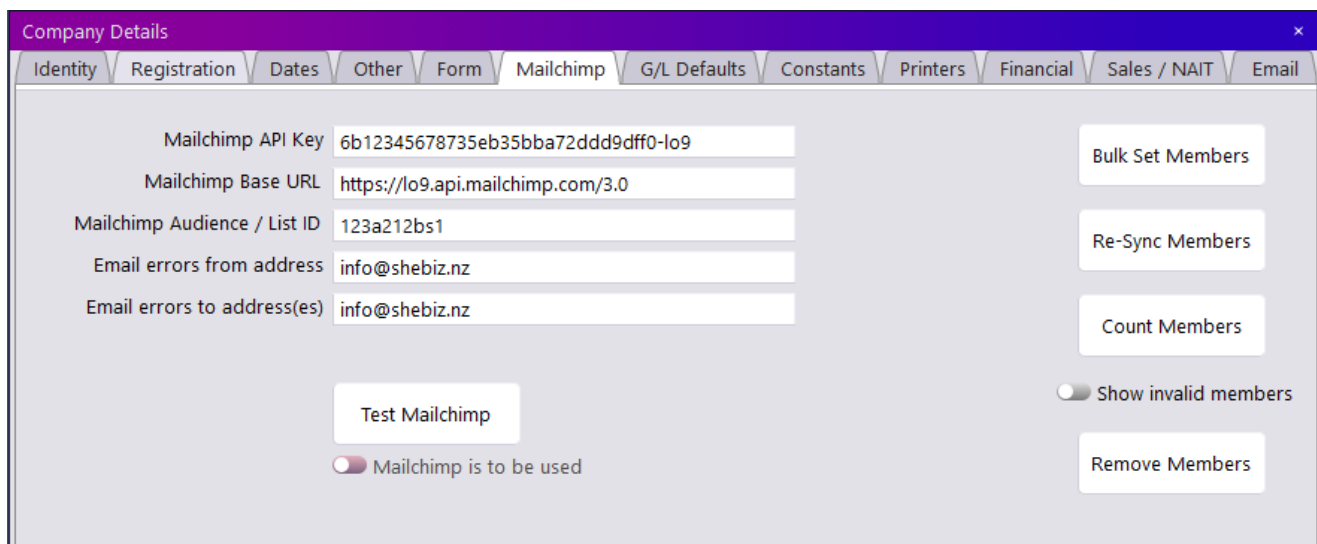
If set to sync, the following details will be automatically sent through to update the Mailchimp member:

- First Name
- Last Name
- Mobile No, or if this is not entered the Phone No
- Email address
- Member Tags
 - Custom Tags entered on the Contact
 - Contact is linked to a Client:
 - Client Group codes
 - Default Agent Code
 - Contact is linked to a Lead:
 - 'LEAD'
 - Product Pen Category code

Livestock Office will send a Mailchimp Member update to Mailchimp in the following circumstances:

- 'Sync with Mailchimp' is set on a contact - new member is added
- 'Sync with Mailchimp' setting is removed on a contact - member is deleted
- Contact details changed - member updated
- Client Default Agent changed - all applicable contacts (those with Sync with Mailchimp set) will have their member tags updated
- Client Group changed - all applicable contacts will have their member tags updated
- Lead product changed - all applicable contacts will have their member tags updated

Livestock Office main menu > File > Company >Company Details > Mailchimp tab



The screenshot shows the 'Company Details' window with the 'Mailchimp' tab selected. The interface includes several input fields for configuration and a set of action buttons on the right side.

Field	Value
Mailchimp API Key	6b12345678735eb35bba72ddd9dff0-lo9
Mailchimp Base URL	https://lo9.api.mailchimp.com/3.0
Mailchimp Audience / List ID	123a212bs1
Email errors from address	info@shebiz.nz
Email errors to address(es)	info@shebiz.nz

Buttons on the right side of the form:

- Bulk Set Members
- Re-Sync Members
- Count Members
- Show invalid members (toggle switch)
- Remove Members

Additional controls at the bottom:

- Test Mailchimp button
- Mailchimp is to be used

Figure 1: Mailchimp settings in Company Details

Field	Description
Mailchimp API Key	This is the Mailchimp API key for your organisation / user. Refer to https://mailchimp.com/help/about-api-keys/ for details.
Mailchimp Base URL	This is the target for the Mailchimp interface. Typically the characters after the '-' in the API Key are the data centre. The URL will then be: https://<data centre>.api.mailchimp.com/3.0
Mailchimp Audience / List ID	You need to setup an audience / list to hold the data from the system. This could be in addition to any other lists you manage in Mailchimp. This ID can be found on the audience settings page.
Email errors from address	The is the email address that emails will be sent from in the event of Mailchimp errors.
Email errors to address(es)	The is the email address(es) that will be sent emails in the event of Mailchimp errors. It should be monitored so that errors can be checked and repaired if needed.
Test Mailchimp	Click to test the settings
Mailchimp is to be used	Select this to start using the Mailchimp interface. N.B. This will only be available after testing button succeeds.
Bulk Set Members	Set all non-member contacts to Sync With Mailchimp (Must have a valid email address)
Re-Sync Members	Re-Sync all contacts that have Sync With Mailchimp set
Count Members	Check all contacts without updating
Show invalid members	List the contacts with invalid data Leave un-set to just show totals
Remove Members	Clear the Sync With Mailchimp settings for all members

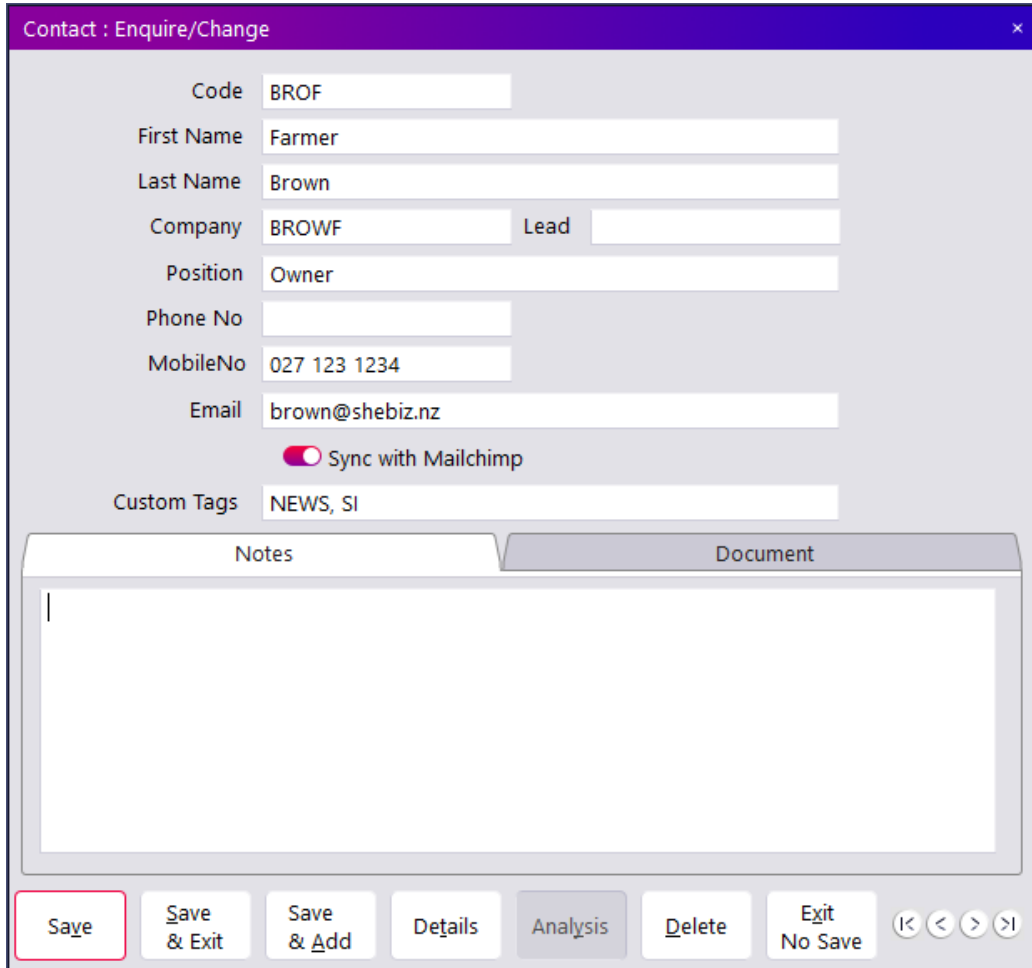
Contacts

Livestock Office main menu > People

> Contacts

> Clients > *open desired client* > Contacts tab

> Customer eXperience Management > Leads > *open desired lead* > Details button



Contact : Enquire/Change

Code BROF

First Name Farmer

Last Name Brown

Company BROWF Lead

Position Owner

Phone No

MobileNo 027 123 1234

Email brown@shebiz.nz

Sync with Mailchimp

Custom Tags NEWS, SI

Notes Document

Save Save & Exit Save & Add Details Analysis Delete Exit No Save

Figure 2: Contact screen

Notes:

- If linked to a client the client code will show in the **Company** field
- If linked to a lead the lead code will show in the **Lead** field
- Must only have a single email address
- Separate multiple custom tags with a comma